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ABSTRACT

Developed as a resource guide for all secretaries and clerical personnel employed in the San Diego Community College District (SDCCD), this manual provides information on matters ranging from district procedures and office operations to English usage and professional growth. The manual's 21 chapters cover: (1) district history, philosophy, and affirmative action policies; (2) district organization; (3) emergency procedures; (4) communication with the Board of Trustees and preparation of Board docket items; (5) guidelines for supervisors for secretarial time management and working with their staff; (6) the importance of attitude, teamwork, and individual behavior in job success; (7) personal and professional growth, and pet peeves of bosses; (8) preparing job descriptions and desk job procedure manuals; (9) tips for time management, fitness, dictation and transcription, typing, duplication, and form development; (10) sources of information on, for example, district policies and employee contracts; (11) telephone procedures; (12) capitalization, punctuation, and word usage; (13) letters, memos, and drafts; (14) filing procedures; (15) meetings and minutes; (16) reports; (17) calendars and "tickler files"; (18) mail processing and delivery; (19) supplies and equipment, office supply inventory, stock and nonstock requisitions, and purchase orders; (20) travel and mileage; and (21) a bibliography of manuals, guides, and relevant SDCCD publications. (DAB)

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References & Resources for Secretaries and Clerical Personnel

AUGUST

1980

Naneene Van Gelder, Editor

San Diego Community College District

3375 Camino del Rio South, San Diego, CA 92108

JC 830 213

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PREFACE

This manual has been developed by the Office Manual Committee, consisting of seven site subcommittees and chaired by Carol Walls, the Staff Development Program representative for the committee. Formed in March 1979, the committee completed its work in August 1980. Committee members participating in the development of the manual are listed below. Although many members were moved to other locations, either by choice or as a result of District reorganization, committee site representation was kept as originally assigned for this project.

Office Manual Committee

Carol Walls
Chairperson

Lawrence Alexander
Staff Development Manager
Advisor to Committee

District Office (Stadium Plaza)

Linda Scott, Chairperson
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Bettye Farmer
Brenda Martin
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Mary Bell
Helen Hammer
Yolanda Sisto

Adult & Continuing Education

Gloria Delgado, Chairperson
Charlotte Barge
Margaret Black
Pat Leyse
Margaret Sheridan

Evening

Florence Gatch, Chairperson
Francis Lewis
Dianne Penny
Lea Wilkins

Two additional subcommittees were formed to meet special needs identified in the process of developing the manual. The tasks of these committees were to: (1) select a standard reference book for use by District secretarial and clerical personnel, and (2) standardize many points about English usage that may vary from source to source. The following individuals participated on these committees:

Selection of Standard Reference Book for SDCCD Office Personnel

Betty Moseley, Chairperson
Gloria Delgado
Dianne Penny
Margaret Sheridan
Yolanda Sisto

Standardized English Usage

Linda Scott, Chairperson
Darlene Deck
Frances Martinez
Joanne Shira
Dorothy Smedley
Shirley Strong

The committee would like to give special acknowledgement to Naneene Van Gelder for her editing skills and to Maeve Neathammer-Edwards for her superb typing skills.

INTRODUCTION

This office manual has been developed for all new and current secretaries and clerical personnel within the San Diego Community College District. It has been developed to serve as a resource and a guide on matters ranging from District procedures and office format to English usage and professional growth. This is your manual. Keep it up to date, and include in it any additional materials or information that you may find helpful in your work.

Make this manual your first resource for questions about format and style. For areas not covered by the manual, the manual's sub-committee for the Selection of a Standard Reference Book recommends the following:

THE ADMINISTRATIVE SECRETARY, 2nd edition, by
Anderson, Lee, Russon, and Crane

and

SECRETARY'S DESK-TOP RESOURCE FILE, 1978,
Bureau of Business Practice

Three other small desk reference books of a specialized nature are recommended to those who may be interested in purchasing them for their personal use:

WORD DIVISION MANUAL, by Silverthorn and Perry

WEBSTER'S INSTANT WORD GUIDE, G. & C. Merriam Company

INSTANT SYNONYMS AND ANTONYMS, by Bolander, Varner, and Pine

We hope you will find this manual to be both practical and easy to use. All material that is supplemental to information included in the text is labeled as an "Attachment" and placed in the manual

following the page referring to the item. On the other hand, examples of District formats to be followed in such areas as correspondence, memos, agendas, and supply requisitions are labeled as "Samples" and included at the end of the section in which they are discussed. It is important to refer to these samples as you read the text. You may want to remove a sample, for example the "General Outline for Exhibits" for Board Docket Items, and place it beside the text as you read the instructions for completing it.

Information that may vary from site to site, such as mailroom and emergency procedures, or from year to year, such as the District calendar, have not been printed for this manual. Instead, we have indicated the place where you should insert this important information. It is up to you to keep the manual both up to date and relevant for your site.

The Bibliography lists the sources of much of the information presented in the manual. For additional reading, refer to the books and magazines listed at the end of the PERSONAL AND PROFESSIONAL GROWTH section.

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HISTORY/PHILOSOPHY

The San Diego Community College District is the second largest community college district in California. About 84,000 students are enrolled in its major day and evening educational programs -- City College, Mesa College, Miramar College, Adult and Continuing Education, and the Educational Cultural Complex.

In addition to two-year Associate in Arts and Associate in Science degree curricula, there are courses in vocational and technical career fields. The District offers the largest selection of academic and vocational programs in San Diego County, with more than 5,000 credit and noncredit courses available at some 400 locations throughout the community.

The District employs more than 1,300 full-time and more than 4,500 part-time certificated and classified personnel.

HISTORY

Between 1914 and 1973, post high school education for the citizens of San Diego was under the supervision of San Diego City Schools. In 1970, the District was given the responsibility for providing adult education for the citizens of San Diego, and in 1972, the people voted to establish the San Diego Community College District as a separate political entity, with its own governing board.

In San Diego, educational programs for post high-school youth and adults have grown steadily over the past 65 years. Junior College classes were opened at San Diego High School in the fall of 1914 with four faculty members and 35 students. In 1938, the San Diego Vocational Junior College was established to offer training beyond the

high-school level for technical-vocational skills. The following year, the San Diego Evening Junior College was established to provide college classes at night. In 1953 land was purchased for the construction of facilities, and in 1956 the new campus was occupied.

The following year, all of the junior college and vocational school programs were combined and the institution was renamed San Diego Junior College. In 1962 a further reorganization resulted in the establishment of the San Diego Junior Colleges with three operating divisions: San Diego City College, San Diego Mesa College, and San Diego Evening College.

The campus of City College has grown from 3 to 33 acres over the years, and a completely new campus for Mesa College was constructed and occupied in February 1964. San Diego Miramar College opened for instruction in the fall of 1969, with course offerings in law enforcement, fire sciences, and related general education.

Adult programs have expanded at the same rate as the college programs. Adult education enrollment increased from 4,000 students in 1916 to 50,000 by 1970. Today there are six adult centers in Adult and Continuing Education and the unique Educational Cultural Complex, which offers adult education as well as accredited college courses through City College. The adult centers have over 300 satellite classrooms and program centers throughout the city, providing community-based education to all of San Diego's citizens in both leased and owned facilities.

PHILOSOPHY AND GOALS

On May 26, 1976, the Board of Trustees adopted the District's Educational Master Plan. This Master Plan puts into words the philosophy and mission of the San Diego Community College District and establishes a series of goals and objectives which serve as a base for future programming and funding within the District. As stated in the Master Plan:

> Maximum benefit can be achieved only if all employees of our District make certain that the objectives of the Educational Master Plan are met within the scope of their responsibilities.

The philosophy, mission statement and goals of the San Diego Community College District are taken from the Master Plan and stated below in their entirety.

Philosophy

"The San Diego Community College District encompasses a multiplicity of people, activities, and locations; yet beneath this diversity exists a core of basic beliefs -- a shared philosophy that must shape and unify all the programs and services that the District offers.

"Central to our philosophy is the concept that the maintenance of a democratic society depends upon the existence of an educated citizenry. This concept gives rise to a series of principles that may guide any institution charged with public education, but what characterizes a given institution and differentiates it from others is a question of which principles it emphasizes. For us in the San Diego Community College District, the following statements constitute the philosophic base from which we operate.

"First, since a democratic society stresses above other conderations the value and interests of the individual, we encourage our students and staff to appreciate themselves and others as individuals and to understand the complex processes by which individuals function successfully in groups. We believe, also, that to foster such understanding we must ourselves acknowledge our students as individuals by creating a climate that is both hospitable to people of all backgrounds and one that accommodates the diversity of our students' aspirations.

"Second, since an educated citizenry is vital, we believe that we must offer our services to all who desire them, not just to an intellectual or economic elite, or to those whose educational needs fall into strictly defined traditional patterns. Further, since educational needs are not static, we recognize the necessity to continually tailor our programs to the changing educational, cultural, and economic requirements of the community we serve.

"Finally, we believe that those who teach and learn must cherish and protect the traditions of academic freedom and responsibility."

Mission Statement

"In defining our role in the educational community, we have undertaken to carry out a series of missions -- broadly conceived statements of purpose that make operative our basic beliefs and fulfill our mandate as a segment of California higher education. We conceive our missions to be these:

... to function as a locally governed segment of California higher education with responsibility for comprehensive occupational

and lower-division college and adult education instructional programs and community services as provided by state law and Board policies;

... to meet each student at the point of the individual's need;

... to provide excellence in teaching and learning;

... to provide a climate that is open and caring and in which students and staff share the joy and excitement of intellectual pursuit;

... to provide programs that meet the broad educational needs of the community,

knowledge of the many heritages of the past,

the ability to think analytically and feel honestly,

knowledge and skills to provide for economic survival and intellectual stimulation to satisfy the need for growth and creativity,

the ability to plan for the future;

... to maintain a close relationship with the community, both in terms of rapport and in assessment of and responsiveness to needs;

... to ensure that our programs are offered at times and locations that are maximally convenient to students and are offered in such a manner as to accommodate differences in preparedness and styles of learning.

"In general, our attitude is that education is not something that 'happens' only to the young and only in specially designed rooms, but rather that education is a lifelong process, its requirements varying with an individual's age and circumstances. As a consequence, we feel that the District must maintain its sensitivity to change and must remain flexible to permit rapid response to that change."

Goals

GOALS SET TO MEET THE NEEDS OF STUDENTS:

1. To minimize any situation that acts as a barrier to education.

2. To create a climate that fosters learning and elicits the best performance from each individual.

3. To provide easy access to a full range of counseling, guidance, and placement services so that students are enabled to make the wisest educational, vocational, and avocational decisions.

4. To improve students' thinking, learning, and survival skills.

5. To provide a transfer program that prepares students, by its breadth and quality, for success at other educational institutions.

6. To provide an occupational education program that prepares students to upgrade their skills in their present occupations, to enter and succeed in existing or new occupations, or to transfer to a more advanced program.

7. To provide educational programs designed to increase students' cultural, political, and economic awareness.

8. To provide educational programs and opportunities for students to satisfy individual needs for good health and physical well-being.

GOALS SET TO MEET THE NEEDS OF THE STAFF AND THE INSTITUTION:

9. To maintain a climate of cooperation and mutual dedication to the goals of the District.

10. To recruit, employ, and retain staff members of a high degree of competence and to provide them with the opportunities to grow during their association with the District.

11. To ensure that the organizational structure and administrative procedures are so designed as to provide quality service and economical use of resources.

GOALS SET TO MEET THE NON-INSTRUCTIONAL NEEDS OF THE COMMUNITY:

12. To participate and share actively in the cultural, intellectual, and recreational life of the community (within financial resources authorized by law).

AFFIRMATIVE ACTION POLICY

The District's Board of Trustees adopted an Affirmative Action Policy in February 1974, committing the District to implementing an active and vigorous Affirmative Action program with the goal of achieving a balanced representation of minorities, females, and males in all areas and categories of District employment.

According to this policy, the District has the additional obligations of: a) seeking to help individuals change attitudes which perpetuate discrimination; b) attempting to rectify past inequities; c) promoting a program of equal opportunity which enables all persons, particularly minorities, women and handicapped, to gain employment and demonstrate their qualifications to compete effectively for jobs at all levels of District employment; d) providing its students with a Districtwide staff that is reflective of both sexes as well as representative of the multicultures and multiraces in the community; e) providing leadership in an active investment in human potential.

Employee Discrimination Appeals

The District has established a procedure for hearing employee appeals of alleged acts of discrimination which are in violation of rights guaranteed under Equal Employment Opportunity legislation and Board-approved policies. Contact the Affirmative Action Representative or Compliance Officer on your campus for further information.

EMERGENCY PROCEDURES

GENERAL EMERGENCY PROCEDURES

Each campus has outlined the procedures that should be followed in case of fire, earthquake, air attack, serious injury or illness, and bomb threats. In addition, the San Diego County Sheriff's Department has developed an information sheet that tells exactly what to do if a bomb threat is received (see Attachment A).

Become familiar with your campus procedures; post a copy in your office, and insert a copy in this manual.

FIRST AID

Office personnel are often the first persons contacted after an accident. It is not up to the office person to be able to replace a nurse or other qualified person, but it is your responsibility to know what should be done and to give prompt assistance.

If emergency first aid appears necessary, attempt to locate a trained individual on campus. For quick reference, insert the following important information below:

Police emergencies: 236-5911

Fire department ambulance: 238-1212

Nearest ambulance service and hospital: _____

_____

Nearest fire department: _____

ATTACHMENT A

SAN DIEGO COMMUNITY COLLEGE DISTRICT

BOMB THREAT INVESTIGATION

CASE NUMBER

INTENDED VICTIM/LOCATION	ADDRESS	PHONE NUMBER EXT.
DATE AND TIME	LOCATION OF OCCURRENCE	TYPE AND NAME OF BUSINESS
PERSON RECEIVING THREAT	TITLE OR POSITION	PHONE NUMBER EXT.
RECEIVED BY PHONE ____ LETTER ____ OTHER ____	BOMB THREAT MESSAGE	

DEMEANOR	SPEECH	VOICE
1 2 SUSPECT	1 2 SUSPECT	1 2 SUSPECT
0 ☐☐ Unknown	0 ☐☐ Unknown	0 ☐☐ Unknown
1 ☐☐ Angry	1 ☐☐ Accent	1 ☐☐ Disguised
2 ☐☐ Apologetic	2 ☐☐ Lisp	2 ☐☐ High Pitch
3 ☐☐ Calm	3 ☐☐ Mumbles	3 ☐☐ Loud
4 ☐☐ Disorganized	4 ☐☐ Offensive	4 ☐☐ Low Pitch
5 ☐☐ Irrational	5 ☐☐ Quiet	5 ☐☐ Medium
6 ☐☐ Nervous	6 ☐☐ Rapid	6 ☐☐ Monotone
7 ☐☐ Polite	7 ☐☐ Slow	7 ☐☐ Nasal
8 ☐☐ Professional	8 ☐☐ Stutters	8 ☐☐ Pleasant
9 ☐☐ Stupor	9 ☐☐ Talkative	9 ☐☐ Raspy
10 ☐☐ Violent	10 ☐☐ Other	10 ☐☐ Soft
11 ☐☐ Other		11 ☐☐ Other

SUSPECT MALE ____ FEMALE ____	ACCENT _ YES ____ NO ____ TYPE	APPROX. AGE	BACKGROUND NOISE, ETC.
SEARCH YES. ____ NO ____	AGENCIES PRESENT	EVACUATION YES ____ NO ____	PERSON RESPONSIBLE FOR EVACUATION
RESULTS OF SEARCH NEG. ____ BOMB FOUND ____	PORTION OF BUILDING		EOD TEAM NOTIFIED TIME:
EOD ARRIVAL TIME	EOD TEAM MEMBERS		

ACTION TAKEN BY EOD TEAM

EVIDENCE/ OR /DISPOSITION

PROPERTY TAG NUMBER

COMMENTS

REPORTING OFFICER	SITE	I.D.#	APPROVED BY:	RELATED REPORTS ☐ NO ☐ YES TYPE:
DATE AND TIME OF REPORT MO. DAY YEAR TIME:	REGION			

SDCCSD-13 Rev/8-79

Names and extension of campus employees knowledgeable in CPR:

_____	_____
_____	_____
_____	_____
_____	_____

Insert a list of employees' addresses, home and business telephone numbers of family members, and persons or doctors to notify in case family members are not available.

Some helpful hints:

1. When a person is seriously injured, or in much pain, keep him/her as quiet as possible, but do not move the person. Send for medical assistance.
2. Do not try to give fluids to an unconscious person.
3. If bleeding is in spurts, an artery is probably involved. Apply pressure to the wound with a clean cloth and get the injured person to a doctor or hospital immediately.
4. If the person is vomiting while lying down, turn the head to one side.
5. When a person is choking, time means life. This person will have about four minutes to escape death or brain damage. Get help immediately.

Have a First Aid kit available in the office or know where you can get one quickly. Write in the location here: _____ _____. Help see that employees injured on the job complete all required accident reports.

INSERT YOUR CAMPUS

EMERGENCY PROCEDURES HERE

BOARD OF TRUSTEES

The San Diego Community College District is a publicly owned and publicly supported agency established under the laws of the State of California. The District is governed by policies adopted by a locally elected, five-member Board of Trustees.

In 1978, the position of student trustee was created by state law. Policies established by the Board are carried out by the Chancellor, who is appointed by the Board, and members of the District staff.

The names of current Board members and their electoral districts are as follows:

Charles E. Reid, President, District E
Daniel B. Grady, Vice President, District A
Gene French, District B
Richard L. Johnston, District D
Lou Ridgeway, District C

COMMUNICATING WITH THE TRUSTEES

As the elective body responsible for governing the affairs of the San Diego Community College District, the Board of Trustees desires good communication with the public, students and members of the staff. The Trustees are sincerely interested in the views of citizens on matters affecting community college and adult education in San Diego, and want to be responsive to the needs and concerns of individuals and organizations in the community.

Not all matters, however, should be brought directly to the attention of the Board. You are encouraged to discuss the matter with the president or adult center dean if a specific college or adult center is involved, or with the appropriate administrator at the District Office. In most cases, your concerns may be readily resolved by working through administrative channels. If your concerns are not resolved by this process, there are a number of ways to bring matters to the attention of the Board. These are summarized here to aid those who wish to communicate with the Board in the most effective manner possible.

Telephone Calls to the Board

Telephone calls to the Board of Trustees may be made by calling 230-2086 or 238-2088, and may be referred to individual members as appropriate.

Letters to the Board

All correspondence to the Board should be mailed to:

Board of Trustees
San Diego Community College District
3375 Camino del Rio South
San Diego, California 92108

Copies of letters are sent to each Board member. A summary of the letter is also placed on the docket of a public meeting of the Board, under **Report on Communications**, unless the letter falls into one of the following categories:

1. It challenges the personal capacity of a District employee to render service to the Board;

2. It involves a District matter being litigated in the courts;

3. It concerns the reputation of a student or former student of the District;

4. It concerns collective bargaining matters.

In these instances, the letter is not placed on the public docket but is offered for private consideration of the Board in Executive Session. In any case, the writer will receive an acknowledgement of his/her letter and will be advised of any action taken by the Board.

If citizens elect to do so, they may address letters to individual Board members, using the same mailing address shown above. In this event, a summary of the letter will not be placed on a public Board docket unless requested by the individual Board member.

Board Meetings

Regular business meetings of the Board of Trustees are held on the second and fourth Wednesdays of each month, except holidays, at San Diego City College. Exact locations of meetings may be obtained by calling the Board Office at 230-2086 or 230-2088. Special meetings are called from time to time as authorized by law and will be limited to the topic(s) specified in the call for the meeting.

Public Presentations

Board meetings are not public meetings, but rather meetings that are held in public. There are two methods by which citizens may address the Board in a public presentation: a **docket presentation** and a **new matters presentation**. Citizens may request a public

presentation on the specific topic(s) listed on the meeting docket during any regularly scheduled Board meeting. New matters presentations are conducted at the special information meetings on the first Wednesday of each month. Persons may request either a docket or a new matters presentation in advance by calling or writing:

Recording Secretary
San Diego Community College District
3375 Camino del Rio South
San Diego, California 92108
230-2086 or 230-2088

Before addressing the Board on any matter, or before answering questions relating to Board presentations, please review the brochure "Communicating With Your Board of Trustees." This small brochure provides detailed information on the types of public presentations, time allowed, and procedures to follow. It is available from the District's Communications Services Office at Stadium Plaza.

PREPARING BOARD DOCKET ITEMS

The information presented here is taken from the Board Docket Manual, which is available in the major offices at each college/center site. If you need assistance at any stage of preparing a Board docket item and/or you do not have access to this manual, please call the Docket Office at 230-2087.

General Instructions

These instructions apply to all Docket items. The outline form corresponds to Sample 1, the "General Outline for Exhibits," which is included at the end of this section.

Refer to the sample while reading the instructions which follow.

A. NAME OF DOCKET ITEM

State clearly and precisely what you are asking the Board to do. You must include all actions required to accomplish your objective. Watch dangling phrases and/or modifiers--they can change meanings. Maintain a file of previously submitted items so you can refer to them for proper format. If you need assistance with wording, call the Docket Office at 230-2424.

Avoid use of terms such as Approve or Approval (this is a part of your proposal--Item C--not the name of the Docket item). Good terms to use are:

Consideration of

Authority to

Award of

Attachments

If the exhibit has a number of attachments, each attachment can be listed following NAME OF DOCKET ITEM. (See Docket Manual, Exhibit 401.1.) You may prefer to refer to attachments in the body of the exhibit as appropriate.

B. STATEMENT OF ISSUE/PURPOSE

1. Purpose and Background

Describe what you are proposing and state clearly and concisely why the proposed action is necessary. If pertinent, relate the item to one of the District's Goals and Objectives (see Section I of this Manual).

Cite chronology of previous Board actions, including dates and docket item numbers or discussions where this is pertinent to the present action. Indicate what or who the proposal would benefit and in what manner; i.e., how many students and/or what programs, ethnicity of groups served, etc. If an ongoing program or a renewal, cite accomplishments to date in terms of students served or placed. Make positive statements citing accomplishments rather than negative statements.

If your proposal involves a new program, the Trustees have requested that a statement or report accompany the exhibit identifying similar programs in the community to assist the Board in assessing possible duplication of services.

If your docket item involves a request for additional resources such as equipment or funds (including transfer of funds), give justification or reasons to support the request. Avoid use of such general terms as "special" materials. Be specific; i.e., programmed learning materials, workbooks, or walkie-talkies, etc.

If supporting materials or reports are needed for clarity, make reference to the materials as attachments and label accordingly.

2. Status:)

or)

Term of Agreement:)

or)

Summary:)

These headings may be used if appropriate for the particular docket item.

3. Alternatives Considered

Give a brief statement describing alternatives that you considered and/or which may be available to the Board in reaching a decision on the matter being considered.

4. Cost and Funding

Total costs should be shown and the cost to the District and/or other agencies' share, any matching funds and indirect support funds, if applicable.

Source of funds should be indicated; i.e., that they exist within the program's budget or that they will need to be transferred (cite budget page and item number in the budget if possible). If funds must be transferred, then the docket item should be written so that the total action is accomplished by one docket item (see Exhibit 496.1 in the Board Docket Manual). If you are in doubt, always check with your business manager or with Business Services.

When appropriate, costs should also be shown to indicate the commitment for future year(s). For example, a docket item written midway through a year establishing new positions should show costs for the balance of the current year plus those for a full year so the Board is made aware of the total commitment.

C. PROPOSAL

To be phrased as:

The Board of Trustees hereby (approves)

(authorizes, or grants authority to)

(adopts)

(accepts)

(Please note that the Board acts as a body, hence the singular verb.)

In general, every action requested in NAME OF DOCKET ITEM must show a Proposal in Section C.

TIME LINE: State the due date or deadline (such as for an application). (The Board may wish to postpone decision on an item or request additional information if time permits. The Time Line shows the Board if a decision is a matter of urgency.)

Typists' and Routing Instructions

1. Use Prestige Elite 72 (12 pitch) type (this facilitates corrections at the District Docket Office, if needed). Do not fold or staple originals.

2. Use prescribed docket stationery--either Action or Information (see Samples 2, 3, 4 and 5 at the end of this section). A signature is required only on the first page. The date in upper right should be the date of the Board meeting at which item will be considered--usually the next regular business meeting. Use stationery without the signature line for subsequent pages of docket exhibit and plain bond for attachments. Do not combine use of Action and Information stationery in the same exhibit.

3. Margins should not extend beyond the edge of the heading. Watch spacing and division so you don't end up with one line only to be carried to a second page. Do not end any page with a colon; it is better to shorten a page and carry an introductory statement forward to a new page.

4. Attachments should be labeled in the bottom right-hand corner (1/2 inch from the bottom, ending 3/4 inch from right edge) as ATTACHMENT A, (if a single page) or ATTACHMENT A-1, ATTACHMENT A-2, etc., if more than one page. If there is more than one attachment, label the second one as ATTACHMENT B, etc. References should be made in the docket item to any attachments and underlined. Be sure that your references in the docket exhibit and title of attachment match; i.e., don't refer to an attachment as a Chart then label it as a Table. Watch your margins -- remember that all material is three-hole punched. At least 3/4 inch is required on the left side.

5. Be consistent in terminology and in capitalization and punctuation.

6. Watch dangling phrases and dangling modifiers; these can change meanings.

7. Refer to Appendix D in the Docket Manual for listing of words frequently used in Board dockets and exhibits. If in doubt, don't guess, consult a dictionary.

8. Docket page numbers are to be placed in the upper right-hand corner of every docket exhibit except for items which go in the 200 Section or the 400 Section of the docket. The 200 and 400 Section numbers will be assigned and placed on exhibits in the District Office. Refer to the Board Docket Numbering System for assistance.

9. All items are to be signed by the President of the College/Center or by the Director of the appropriate unit. Initials of the preparer and typist should appear on the docket exhibit.

10. All exhibits are to be ready for duplication. Odd-sized documents or items typed to the edge of the paper are to be reduced and ready for reproduction on 8-1/2 x 11 paper. If reduction equipment is not available, attach a note to the master so that reduction can be accomplished in District Offices prior to final duplicating.

11. When exhibit involves establishing or continuing position(s), the below-listed information should be given in the sequence shown. (It is not necessary to show headings or set forth in columnar format as long as all pertinent information is given.) Information on positions must be cleared by Personnel.

No. of Pos.	Position Title	Salary Range & Amt.	Collective Bargain. Unit	Physical Location
2.00	Adult Instr.	Sal. Range $1255-1864	Adult Tchrs	Centre Cit
.75	Instr. Aide	Range 13 ($660-842)	Office-Tech.	Mesa

12. Unfolded and unstapled originals should be forwarded through appropriate channels to offices as indicated below. Carbon copies should be sent to the Docket Office. Please note: If personnel, budget, and/or facilities are involved, you must also secure approval from these units. A copy of any contracts must be included for review by these units.

A. Curriculum or Student-related items (usually for 400 Section) -
Through channels to Director of Vocational Education

If Vocational Education to -
Director of Vocational Education

If Instructional Services to -
Provost

If Student Services to -
Director of Student Services

Grants/Contracts/Agreements (refer to Policy 5100 and implementing procedures, particularly Procedure 5140.1) -
Through channels to Coordinator, Grants and Contracts *

B. Personnel (500 Section) -
Through channels to Director, Personnel Services

C. Supplies & Equipment (600 Section) -
Through channels to Purchasing Manager

D. Buildings and Real Estate (700 Section) -
Through channels to Director, Facilities and Equipment Services

E. Budget & Finance (800 Section) -
Through channels to Director of Business Services

*All contracts/agreements/resolutions require legal counsel approval. Also, the Trustees have requested that during negotiation of contracts, all matters relating to finance are to be cleared with Business Services prior to finalization of the contract.

13. Department secretaries in the District Office are responsible for delivering the signed original and one copy of all material to the Docket Office. Please do not staple originals. Copies should be stapled in page order, then paper-clipped on top of the originals. Be sure that the name and title of the program Director/President and Chancellor are typed on Page 1. (These are the persons who will sign the exhibit.) It is suggested that department secretaries who type docket pages keep copies of previous docket sections in a notebook for easy reference and to insure uniform wording.

14. If contracts, agreements, resolutions or leases are being presented which require the Board President's signature or certification by the Board Secretary, the department responsible for preparing the item should deliver the appropriate number of copies to the Board Secretary prior to the Board meeting. In most cases, signing authorization has been delegated to an appropriate Director/President.

    All contracts, resolutions and leases must bear the stamp of Legal Counsel. Check the Signature Authorization Memo for those authorized to sign documents and contact Legal Counsel (Appendix H, Board Docket Manual).

    It is important that materials such as resolutions, contracts and leases be sent to Legal Counsel well ahead of docket deadlines so there is adequate time to review and make any corrections that may be necessary.

15. Policies and Procedures being placed on a docket for Board approval/review MUST BE CLEARED IN ADVANCE THROUGH THE POLICY/PROCEDURES OFFICE (refer to Policy 2002 and Procedure 2002.2). Copies of Policies/Procedures are distributed for review and discussion in District Executive Council when the tentative docket is reviewed. Therefore, the final docket exhibit on Policies/Procedures must reach the Docket Office in sufficient time to permit reproduction of required copies; otherwise, the requesting office will be expected to deliver sufficient copies for review in District Executive Council.

16. Please adhere to established deadlines. If you have an emergency and cannot meet the deadline, call the Docket Office (230-2087). Sometimes arrangements can be made for late delivery.

17. If it becomes necessary to revise materials in an exhibit that has already gone out to the Trustees, any wording deleted should be lined through and any wording added should be underlined so that the Trustees can see exactly

what has been changed. This saves their time in that they do not have to again read the entire item to determine what the changes are. This technique is frequently employed to show changes made between a first and second reading (such as on policies).

Docket Cycle

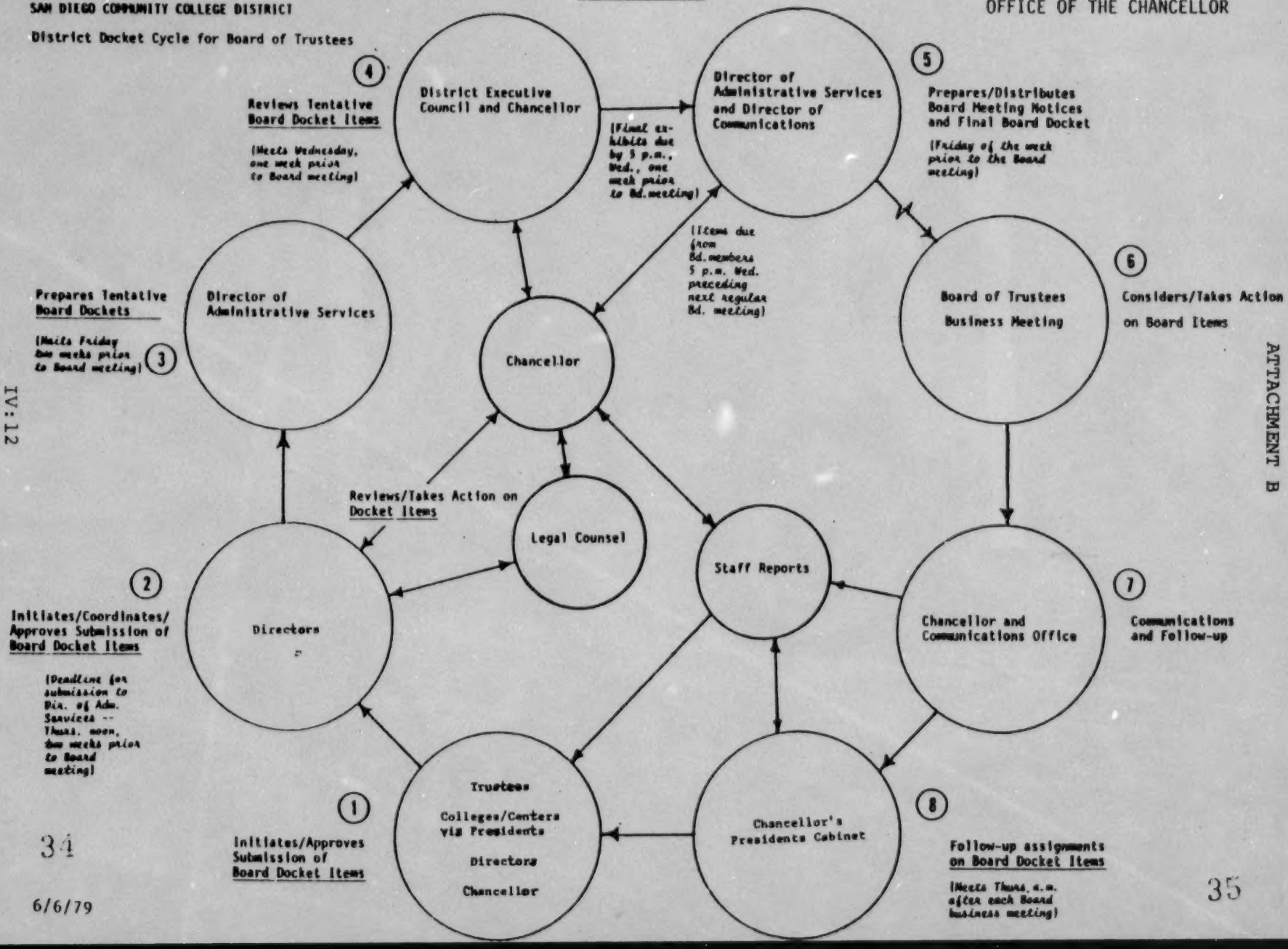
Attachment B on the following page shows the District procedure for processing docket items, from the initial submission of the item through Board action and follow-up.

SAN DIEGO COMMUNITY COLLEGE DISTRICT

District Docket Cycle for Board of Trustees

DOCKET CYCLE

OFFICE OF THE CHANCELLOR


4
Reviews Tentative Board Docket Items
(Meets Wednesday, one week prior to Board meeting)
District Executive Council and Chancellor
(Final exhibits due by 5 p.m., Wed., one week prior to Bd. meeting)
Director of Administrative Services and Director of Communications
5
Prepares/Distributes Board Meeting Notices and Final Board Docket
(Friday of the week prior to the Board meeting)
(Items due from Bd. members 5 p.m. Wed. preceding next regular Bd. meeting)
Prepares Tentative Board Dockets
(Meets Friday two weeks prior to Board meeting)
3
Director of Administrative Services
Chancellor
Board of Trustees Business Meeting
6
Considers/Takes Action on Board Items
Reviews/Takes Action on Docket Items
Legal Counsel
Staff Reports
2
Initiates/Coordinates/ Approves Submission of Board Docket Items
(Deadline for submission to Dir. of Adm. Services -- Thurs. noon, two weeks prior to Board meeting)
Directors
Chancellor and Communications Office
7
Communications and Follow-up
Trustees
Colleges/Centers via Presidents
Directors
Chancellor
Chancellor's Presidents Cabinet
1
Initiates/Approves Submission of Board Docket Items
8
Follow-up assignments on Board Docket Items
(Meets Thurs. a.m. after each Board business meeting)

Board of Trustees

San Diego
Community College District
3375 Camino del Rio South San Diego, CA 92108 (714) 230-2000

GENERAL OUTLINE FOR EXHIBITS

No.

ACTION

Subject: (Identify what the item concerns) **Date:** (Date of Board meeting)

Docket Office
230-2424

A. NAME OF DOCKET ITEM) State clearly and precisely all actions required by the Board and identify campus/center/program.

B. STATEMENT OF ISSUE/PURPOSE

1. Purpose and Background:) Describe issue/purpose in first sentence(s), then educational goals and previous Board action/consideration.

2. Status:) Additional headings which could be
or) used if appropriate for the specific docket item.

Term of Agreement:) Cite specific dates of agreement.
or

Summary:

3. Alternatives Considered:) Brief statement(s) describing alternatives sought and considered in reaching decision.

4. Cost and Funding:) Provide complete information for a full year.

C. PROPOSAL

The Board of Trustees hereby (authorizes), (grants authority), (adopts), (approves), (accepts First Reading).) Use appropriate term and list complete action requested.

TIME LINE:) Show date Board approval is required and reason for the date shown.

NOTE: This is an outline only. See General Instructions for additional detail applying to all docket items; see also Typists' Instructions. A Docket Manual is available in the major office(s) at most sites for use of those who prepare docket exhibits on a recurring basis.

(Docket paper is available from the Docket Office, Room 320)

Recommended: _____
(Name, title, and location to be typed in; first page to be signed)

Approved for Consideration: _____
(Name and title of Chancellor to be typed in)

Board of Trustees

San Diego
Community College District
3375 Camino del Rio South | San Diego, CA 92108 (714) 230-2000

No.
ACTION

Subject: **Date:**

Docket Office
230-2424

SAMPLE OF DOCKET EXHIBIT PAPER. TO BE USED AS FIRST PAGE FOR ANY ITEM THAT REQUIRES THE BOARD TO TAKE ACTION.

Recommended: _____ **Approved for Consideration:** _____

Board of Trustees

San Diego
Community College District
3375 Camino del Rio South | San Diego, CA 92108 (714) 230-2000

No.
ACTION

Subject:	Date:

Docket Office
230-2424

SAMPLE OF DOCKET PAPER.
TO BE USED AS SECOND PAGE
FOR ANY ITEM THAT REQUIRES
BOARD ACTION. THIS PAGE
DOES NOT REQUIRE SIGNATURES.

Board of Trustees

San Diego
Community College District
3375 Camino del Rio South | San Diego, CA 92108 (714) 280-7610

No.
INFORMATION

Subject: **Date:**

SAMPLE OF DOCKET EXHIBIT PAPER

FOR INFORMATION ITEMS (REPORTS).

USE THIS ONLY IF THE BOARD IS NOT BEING ASKED TO TAKE ACTION.

THIS SHOULD BE USED AS THE FIRST PAGE - NOTE SIGNATURES ARE REQUIRED.

Recommended: _____ **Approved for Consideration:** _____

Board of Trustees

San Diego
Community College District
3375 Camino del Rio South, San Diego, CA 92108 (714) 280-7610

No.
INFORMATION

Subject: Date:

SAMPLE OF DOCKET EXHIBIT PAPER TO BE USED AS SECOND PAGE(S) ON ITEMS THAT DO NOT REQUIRE BOARD ACTION (REPORTS).

NOTE THAT SIGNATURES ARE NOT REQUIRED EXCEPT ON THE FIRST PAGE (See Form preceding).

A WORD TO THE BOSS

The developers of this manual felt an efficient boss-secretary* team was important enough to devote a section to this topic. The team is made up of two complementary types: The planner and the doer. No other person is in such close and constant contact with the boss as the secretary. Secretaries frequently have a wider perspective than most subordinates since they are aware of most aspects of the boss's job. Due to this unique relationship, the wise boss will want to enlist the secretary's help and advice in solving his/her problems.

TIME MANAGEMENT

One of these problems is time management. The best way for a boss and his/her secretary to approach this problem is to focus on both jobs jointly, rather than on either job alone. This joint approach considers the boss and the secretary as a single work unit, and helps ensure that both become more time efficient. A joint approach also allows the shared perception of each job, and each other's time problems. The secretary brings a different, often valuable, perspective to the boss's time wasters. The boss can provide the same alternative insight into the secretary's time problems.

The profile forms on the following pages were designed by the Time Management Center in Grandville, Michigan. Their purpose is to help the boss and the secretary find the best starting point for their time management problems.

* Also refers to clerical personnel.

Manager's Profile

1. The manager should identify and rank his or her top six timewasters in Column 1.

2. The manager's top six timewasters are weighted in Column 2 as follows:

   No. 1 timewaster = 30
   No. 2 timewaster = 25
   No. 3 timewaster = 20
   No. 4 timewaster = 15
   No. 5 timewaster = 10
   No. 6 timewaster = 5

3. The secretary should identify and rank the manager's top six timewaster in Column 3. This should be done independently without looking at the manager's ranking. Weights should be assigned in Column 4 on the same basis as above.

4. Add recorded weights in Columns 2 and 4 for each timewaster identified. Record the total weight in Column 5.

5. Record the final ranking for the manager's timewasters in Column 6. The timewaster with the greatest combined weight is No. 1, etc. In case of equal weightings, use the manager's rank order as a guide.

Secretary's Profile

1. The secretary should identify and rank his or her top six timewasters in Column 1.

2. The secretary's top six timewasters are weighted in Column 2 as follows:

   No. 1 timewaster = 30
   No. 2 timewaster = 25
   No. 3 timewaster = 20
   No. 4 timewaster = 15
   No. 5 timewaster = 10
   No. 6 timewaster = 5

3. The manager should identify and rank the secretary's top six timewasters in Column 3. This should be done independently without looking at the secretary's ranking. Weights should be assigned in Column 4 on the same basis as above.

4. Add recorded weights in Columns 2 and 4 for each timewaster identified. Record the total weight in Column 5.

5. Record the final ranking for the secretary's timewasters in Column 6. The time waster with the greatest combined weight is No. 1, etc. In case of equal weightings, use the secretary's rank order as a guide.

This procedure will provide an independent and a joint assessment of where time is being wasted for both the boss and the secretary. Comparing the two profiles should provide insight into the time relationships of both jobs. By following the procedure, both the boss and the secretary will find good solutions to their time problems.

MANAGER'S TIMEWASTER PROFILE

FREQUENTLY IDENTIFIED TIMEWASTERS If any of yours are missing, add them at bottom of list.	LISTING BY MANAGER		LISTING BY MANAGER'S SECRETARY		MANAGER'S COMBINED LISTING	
	Rank (1)	Weight (2)	Rank (3)	Weight (4)	Combined Weight (5)	Final Ranking (6)
1. Interruptions, drop-in visitors, distractions, telephones.						
2. "Doing it myself," involved in too much detail, routine tasks						
3. Crises, fire-fighting						
4. Lack of objectives, deadlines, priorities, daily plans						
5. Meetings — scheduled or unscheduled						
6. Paperwork, mail, reports, reading						
7. Leaving tasks unfinished, jumping from task to task						
8. Attempting too much at once						
9. Procrastination, indecision, day-dreaming						
10. Ineffective communication, poor feedback provisions, not listening						
11. Lack of self-discipline						
12. Cluttered desk and office, personal disorganization						
13. Ineffective delegation						
14. Inability to say "no"						
15. Socializing, idle conversation						
16. Constantly switching priorities						
17. Failure to do first things first						
18. Travel, waiting, commuting						
19.						
20.						

SECRETARY'S TIMEWASTER PROFILE

FREQUENTLY IDENTIFIED TIMEWASTERS If any of yours are missing, add them at bottom of list.	LISTING BY SECRETARY		LISTING BY SECRETARY'S MANAGER		SECRETARY'S COMBINED LISTING	
	Rank (1)	Weight (2)	Rank (3)	Weight (4)	Combined Weight (5)	Final Ranking (6)
1. Lack of objectives, deadlines, priorities, daily plans						
2. Attempting too much at once						
3. Inability to say "no"						
4. Office procedures not established, equipment problems, inadequate filing system						
5. Socializing, idle conversation						
6. Procrastination, indecision, daydreaming						
7. Cluttered desk and office, personal disorganization						
8. Leaving tasks unfinished, jumping from task to task						
9. Interruptions, drop-in visitors, distraction, telephones						
10. Mistakes, ineffective performance, poor training						
11. Lack of independence, overcontrol by manager						
12. Switching priorities, confused priorities						
13. Unclear instructions, incomplete information						
14. Not being kept informed by manager						
15. Interruptions by manager, working for disorganized manager						
16. Errands, trips to copying machine, getting coffee, etc.						
17. Redoing work due to incorrect dictation from manager						
18. Ineffective communication, failure to listen						

GUIDELINES FOR USING YOUR SECRETARY

The following recommendations are taken from a staff development workshop presented by Willeen Hasler and Associates.

1. Take the time to discuss team effectiveness--how both of you can make better use of time.
2. Include your secretary as an important member of your team--include her/him in meetings, training and development programs.
3. Treat your secretary with dignity and respect--provide support and backup--don't abuse or embarrass.
4. Don't downgrade your secretary to a "go-for."
5. Discuss objectives, priorities and plans with your secretary daily--do it first thing in the morning.
6. Don't constantly interrupt your secretary throughout the day.
7. Discuss problems and ideas with your secretary--ask for her/his ideas, suggestions and opinions.
8. Provide the best possible office equipment.
9. Allow your secretary to handle your schedule.
10. Tell your secretary where you're going, how you can be reached, and when you'll return.
11. Keep your secretary fully informed about what's happening; advise of changes.
12. Hire the best, expect the best, pay the best.
13. Provide for your secretary's professional development; encourage updating of skills and capabilities.
14. Encourage other people to deal directly with your secretary for things he/she can handle.

15. If you share a secretary, don't expect him/her to resolve the problems and dilemmas of working for multiple bosses--that's your responsibility.

16. Ask your secretary what he/she could do that you're now doing.

17. Ask your secretary how you could manage your time better and how he/she could help you manage your time.

18. Ask your secretary how and when he/she would like to receive dictation and handle the mail, telephone calls, visitors, meetings, calendars, filing, etc.

19. Take the time to provide good instructions--use good feedback techniques--allow for initiative.

20. Ask your secretary what he/she would like to know about your projects, goals and objectives, and priorities.

"Pet Peeves of Bosses" are also included in this manual. See section on PERSONAL AND PROFESSIONAL GROWTH.

PROFILE OF THE SUCCESSFUL EMPLOYEE

A successful employee is a combination of many factors, both personal and professional. Even the best of us can occasionally lose perspective on ourselves and our jobs in the rush of daily activities. This section has been developed to clarify for you qualities that are an important part of success in your job, both as an individual and as a member of the District team.

ATTITUDE

A positive, healthy attitude can be the key to success in your job. Research shows that few people are replaced for poor performance on the job. Most discharges are due to poor work attitudes, difficult personalities, and lack of good human relations. Carefully consider the following points:

1. Accept the fact that you need your job as much as your job needs you.

2. Never say "I don't know" or "I can't help you" without telling the person inquiring where they may obtain the answer to their question. Go a step further and offer to get the answer for them or find out how you can help.

3. "You never get a second chance to make a good first impression."

4. Think before making a decision that will affect the actions and decisions of others.

5. The philosophy of an organization is interpreted every day by its office employees in the many contacts they have. Remember that you are the human relations representative for your boss and for the District.

6. Honest actions, while serving in accordance with administrative policies, will assure fairness in all those being served. Honesty is essential in order to maintain a good balance. You will succeed in being fair to everyone if you know what you should do, how you should do it, and then go about doing it.

7. Kindness is more than a cheerful, courteous attitude. It is caring about those you serve and those with whom you work. When dealing with people making complaints or with criticism, try the following suggestions:

   a. Listen to the problem, asking questions as necessary to find out exactly what the problem is.

   b. Sympathize with their angry or upset feelings and show you do understand the problem.

   c. If you or your site/office made a mistake, admit it readily.

   d. After they've had a chance to express their feelings completely, offer to do your best to solve the problem.

   e. If you can't help them, or not in the manner they desire, let them know you're sorry about it. If possible, explain why you can't help them.

   f. Take whatever steps are necessary so that the problem is not likely to occur again.

   g. If they insist on using obscene language, you are certainly entitled to hang up the telephone (gently, please) or turn them over to your office supervisor if possible.

8. Be an able representative of the District by being familiar with policies, history and personnel.

9. Support management's actions in public and private.

10. Remember that many of the students are adults and treat them accordingly. Your work may be a critical factor in the judgment the adult learners form about the program.

TEAMWORK

Teamwork is joint action by a group of people to achieve a common objective. You and your co-workers hold common objectives, and communication, cooperation and mutual problem solving are essential to achieving these objectives. There will be many instances each day when you will need the cooperation of your co-workers to perform your job successfully. There will be other instances when you will be asked to lend a hand. The following are some points for each individual, as a member of a larger team, to keep in mind:

1. Develop a thorough knowledge of the functions of your office. Accomplishment of all duties in as efficient and complete a manner as possible is your responsibility as part of the office team. When work is not done, the entire team is affected.

2. Even though your job is just one part of the team effort, you must assume your share of the outcome.

3. Be a good sport if you don't agree with the supervisor or the administrator about a decision. Keep communications open and be tactful when offering counter-suggestions. Don't always try to get your way, but don't give in all the time either. Be able to distinguish the important issues from the unimportant, and know when to negotiate a workable compromise if it's called for. Defeat should be taken with grace and maturity, for the boss does have prerogatives and might have very valid reasons for decisions you don't understand.

4. Be dependable: be on time for work, clear your desk properly before leaving in the evening, and be sure telephone coverage is maintained.

5. Awareness of the needs and goals of the total institution, rather than just your needs and those of your immediate office, is another requirement for teamwork.

6. Confidential matters must remain just that, regardless of how close your friends and fellow workers are to you. Some suggestions:

   a. Never hint that you know something someone else doesn't.

b. Keep confidential papers on your desk only as long as necessary and put them away when you leave your office.

c. Remove confidential papers from your typewriter if someone is in a position to look over your shoulder, or roll the carriage back so they can't read the material.

d. Keep your voice low when discussing private matters over the telephone or with others in the office.

e. When asked a leading question, feign ignorance by answering, "I really can't say" or pretend you are extra busy and can't talk.

f. Take a firm stand when pressed for information and offer to make an appointment to discuss it with your boss. That usually puts an end to it.

7. There are all kinds of bosses with all kinds of personalities, problems, habits, and styles. Some are easy to work with, some hard. But very few are impossible. If you work for a person whose moods change occasionally, you should strive to control your own moods and concentrate on your reactions to them. If you really want to remain working in that office, keep your mood constant and don't you give in to emotional upheavals at the same time.

8. Do all you can to help your peers get their work done, particularly in times of stress and heavy work loads. Offer help in a straightforward, quiet manner and without bragging to others about your help.

9. Regarding calendars: Having background data ready for each appointment and project will save time. Make every attempt to know when meetings and conferences are scheduled, what materials are needed, and have them ready when the boss needs them.

10. Offer suggestions and opinions when you can justify them, but don't be too aggressive or domineering about your ideas, your job, or position. Don't force your ideas when they are not welcome. When your suggestions are not accepted, be gracious about it and continue to work with your co-workers cheerfully.

11. Your professional loyalty is three-fold: to your boss, to your employer ... and to yourself. Remember, however, that you can easily get involved in "excessive" loyalty. The misuse of loyalty is a killer; it will fill your life with stress, tension, anxiety and worry. Your job can be a great source of delight if you keep this perspective in mind.

12. When there is disharmony in the office and you feel tense, ask yourself the following questions before you direct fault at anyone:

    a. Who is upsetting me?

    b. What is the reason?

    c. When did it start?

    d. Why did it happen?

    e. How did I help create the situation and how may I correct it?

    Try to understand individuals as human beings; their jobs and responsibilities, work habits, clues that indicate pressures or the need for help.

13. Be a self-starter: show initiative and don't wait for someone else to show you the way. The willing worker who always does what is needed, rather than just what is required, is always appreciated by all.

14. A word for supervisors: "Few things help an individual more than to place responsibility upon them and to let them know that you trust them" -- Booker T. Washington.

PERSONAL

You must also concentrate on yourself. Only you can be responsible for the impression you make and for your performance on the job. The following points highlight the importance of you as an individual as you contribute to the overall operation of the District:

1. A sense of humor is the ability to laugh at yourself.

2. A reasonable and pleasant disposition is more important for any office employee than good looks. One who can maintain an even disposition without sulking or becoming irrational does more to please a boss than flawless looks or skills.

3. Your appearance is important. Clothes should be personally becoming, simple, business-like, clean and pressed. Hairstyles should be neat and manageable and makeup tasteful and subdued.

4. Relax as often as possible and don't allow stress to build fatigue or distract you. Seek every possible way to cut down on the noise level in your office; i.e., use typewriter and machine pads, turn the telephone ring down, don't holler at a co-worker across the office. A quiet atmosphere and attitude gives the impression of control and command of oneself and the situation.

5. Prepare for your future: take advantage of the wonderful opportunities we have in the District to continue your education and improve your job skills.

6. Honesty is never:

   a. Using office stationery and supplies for personal use.

   b. Making personal telephone calls needlessly.

   c. Using copy machine for personal items.

   d. Making it a habit to come in late or overstay lunch or break periods.

   e. Abusing sick leave and personal business leave benefits.

   f. Being "brutally" honest with co-workers.

7. Tolerance is an essential characteristic of the well-adjusted professional person. Getting along with others requires imagination and the ability to put yourself in the other's position. You'll find people who always complain about their job, jumping from job to job looking for the perfect opportunity, the perfect job. Those people are going nowhere as there is no perfect boss or job. There are things to be put up with wherever you go. Life is not fair, and merit sometimes goes unrewarded. Stay tolerant, stay flexible, stay understanding. Be willing

to persevere and don't beat your head against the wall, despite the obstacles. Work with and within the conditions that exist and you'll find peace of mind by achieving small gains, if not large ones. That's better than suffering a complete loss.

8. Nobody's perfect. You may think nothing of it when someone else makes a mistake, but then turn around and become very hard on yourself when you do it. You have the right to make mistakes; learn from them.

9. Don't put a limit on yourself as there is no limit to how far you might be able to go. Don't give up on projects or tasks just because you have never done them before. Try new things--to grow we have to experiment and take the risks.

The majority of these pointers to success were taken from "ABC's For Office Employees," by Willeen Hasler, a former community college administrative secretary.

PERSONAL AND PROFESSIONAL GROWTH

PERSONAL GROWTH

In a survey conducted by the National Secretaries Association, 135 executives were asked to rank the ten top-stated attributes of a good secretary, clerical assistant, or administrative assistant. They were, in this order: skill level, judgment, loyalty, initiative, diplomacy, appearance, ability to make decisions, cooperation, punctuality and flexibility.

The following list contains questions intended to help each of us assess how we are doing:*

	Always	Sometimes	Never
Skills			
1. Do I type rapidly, proofread carefully, and submit work free of errors?	_____	_____	_____
2. Do I take dictation accurately and transcribe it well and as soon as possible?	_____	_____	_____
3. Are my letters, memos, reports, and forms neatly typed, free of smudges, well-arranged, and proofread?	_____	_____	_____
4. Do I know how to use office machines, such as the calculator, mimeograph, copiers?	_____	_____	_____

*San Diego City Schools Office Manual, San Diego City Schools, San Diego, 1970.

	Always	Sometimes	Never
5. Do I take the initiative to compose letters on routine matters?	_____	_____	_____
6. Do I know the rules of grammar, spelling, capitalization, punctuation, and work usage? If not, do I know where to find the answer?	_____	_____	_____
Attitude			
1. Am I proud of the San Diego Community College District, and do I boost it when I have a chance to?	_____	_____	_____
2. Do I think of my job as important, no matter what position I hold?	_____	_____	_____
3. Am I a good team member? Do I cooperate with other employees?	_____	_____	_____
4. Do I tackle a boring job with the same enthusiasm as I have for one of my favorite projects?	_____	_____	_____
5. Am I a good listener?	_____	_____	_____
Business Qualities			
1. Do I use the telephone for personal calls only in emergencies? Do I take time off from work for personal business only when I can't handle these things outside of working hours? Am I careful about time for coffee breaks and lunch hours?	_____	_____	_____
2. Do I like to get things done? Is the desire there because I want a good evaluation, or is it there because of the inner satisfaction that comes from accomplishment?	_____	_____	_____

Grooming

	Always	Sometimes	Never
1. Am I neat and clean? Do I bathe or shower each day, use deodorants and mouthwashes, and control foot odor?	_____	_____	_____
2. Are my clothes and makeup appropriate for the office?	_____	_____	_____

Voice

1. Do I speak relatively free from grammatical errors?	_____	_____	_____
2. Is my voice well-modulated and pleasing to others?	_____	_____	_____

Temperament

1. Do I have a cheerful outlook and a ready smile, even when it's raining?	_____	_____	_____
2. Do I keep my sense of humor when minor annoyances make it difficult?	_____	_____	_____
3. Am I able to laugh at myself?	_____	_____	_____

Manners

1. Am I as courteous to the person I don't like as I am to the attractive individual with whom I have a considerable amount in common?	_____	_____	_____

Dependability

1. Can I be trusted to keep confidential matters to myself?	_____	_____	_____
2. Do I complete an assignment on time when possible and do it well?	_____	_____	_____
3. Do I remember to convey complete information to others when I am responsible for communicating with others?	_____	_____	_____

	Always	Sometimes	Never
Initiative and Being Resourceful			
1. Do I look for projects to be done? Do I plan ahead?	_____	_____	_____
Accuracy			
1. Do I check everything -- names and addresses, numbers, questionable spelling? Do I proofread carefully? Do I give complete attention to my immediate task?	_____	_____	_____
Organization			
1. Do I plan my work before I begin? What must I do? When is it due? Are the necessary supplies on hand?	_____	_____	_____
2. Do I organize a formidable task into several short units of work?	_____	_____	_____
Housekeeping			
1. Is there a place for everything and everything in its place?	_____	_____	_____
2. Is my desk neat and provided with appropriate supplies? Are papers, carbons, forms, and erasers near my typewriter?	_____	_____	_____
3. Have I been asked to keep my boss's desk well-arranged and stocked, or is the hands-off policy preferred?	_____	_____	_____
4. Do I leave my desk top neat and clear and cover my typewriter at the end of each work day?	_____	_____	_____
Reaction to Criticism			
1. Do I consider criticism of myself as a means of improvement?	_____	_____	_____

	Always	Sometimes	Never
Judgment			
1. Do I look at all sides of a problem before coming to a conclusion?	_____	_____	_____
2. Do I make decisions quickly and accurately?	_____	_____	_____
3. Do I take the responsibility for my decisions, right or wrong?	_____	_____	_____
Memory			
1. Do I associate names with faces easily?	_____	_____	_____
2. Do I itemize verbal or written instructions so that I can check them off as they are done?	_____	_____	_____
Pressure			
1. Am I able to meet deadlines (reasonable deadlines); keep many jobs in progress at one time; squeeze in urgent projects without panic?	_____	_____	_____
General Growth			
1. Do I make an effort outside of office hours to upgrade myself by attending classes and seminars, reading, and attempting to grow as a person?	_____	_____	_____

PET PEEVES OF BOSSES

The California Association of Educational Office Employees has compiled 19 complaints that school administrators make about their secretaries and clerical employees. To how many of these do you reply "guilty"?

1. Failure to remind boss of business appointments.
2. Failure to maintain files in current state.
3. Failure to proofread material carefully before it leaves the office.
4. Inability to detect spelling and grammatical errors, poor word usage, and poor sentence structure.
5. Unwillingness to rewrite letters when corrections are indicated.
6. Excessive time away from desk (long rest periods).
7. Excessive use of telephone and business hours to tend to personal business.
8. Failure to assume responsibilities willingly without having to be told repeatedly what should be done.
9. Indifference to criticism -- having to be told to correct same error over and over again.
10. Know-it-all attitude.
11. Failure to perform assigned duties promptly.
12. Consultation with boss only when in trouble and then full of alibis.
13. Lack of good receptionist etiquette -- failure to make visitors feel welcome without undue familiarity.
14. Excessive visiting during working hours.
15. Gossiping about co-workers and superiors.
16. Excessive and frequent discussion of personal affairs.

17. Allowing emotional reactions to personal affairs to interfere with job.

18. Unwillingness to approach changes with open-mindedness--set ideas and methods.

19. Poor telephone techniques.

PROFESSIONAL GROWTH

The San Diego Community College District administration and your supervisors have a real interest in your efforts to improve your job effectiveness and to prepare yourself for advancement to better positions. In this respect we hope to encourage you and provide opportunities for you to further your ambitions.

On-the-Job Training

The core of the District's education and training program is on-the-job training. It is a continuing process that begins with your first day on the job. Your supervisor is responsible for your on-the-job training and he/she will work closely with you to assist in developing your skills and knowledge.

Staff Development Program

Training and educational opportunities for classified staff are offered under the Staff Development Program. Activities are in these four major areas:

Skills Attainment--Courses and programs designed for employee's specific needs; i.e., clerical, accounting, and supervisory skills.

In-Service Training--Workshops on District procedures, policies, or other subject areas related to functions of District departments.

Tuition Reimbursement--Depending on availability of funds, up to $75 per semester or $50 per quarter is made available to defray costs of approved courses. To qualify for funds you should take courses that relate to your current job assignment, courses that will help you qualify for advancement in the District, or courses toward a degree. Applications for reimbursement may be obtained in the business manager's office on campus or in the Personnel Services office at Stadium Plaza.

Professional Growth Transfer--To increase opportunities for District employees in obtaining a lateral transfer.

Staff Development Advisory Committee--Comprised of classified staff who have been appointed by the Chairperson of the Classified Advisory Council. The committee reviews program implementation and provides input; plans and implements various phases of communication from management to classified employees; remains cognizant of employee needs and provides the Staff Development Coordinator with input for program revision around those needs; and at the conclusion of specific program segments, evaluates the program in terms of strengths and weaknesses and assists with the development of future programs.

Educational Incentive Program

This program gives regular monthly classified personnel the opportunity to advance across the salary schedule at a faster rate. This is an encouragement to you to return to school and can benefit you as well as the District.

All credit courses, regardless of subject matter, offered by accredited institutions and in progress on or after July 1, 1976, are allowable for salary credit. Those courses offered as "skills attainment" courses by the Staff Development Program also qualify. Salary credit is allowed for courses taken on your own time.

You will be granted a one-step salary increase on the first of the month concurrent with or immediately following the satisfactory completion and verification of 12 semester units of credit.

Personnel Records

Your record with the District begins with your job application. This and other official forms, documents, correspondence, and miscellaneous records pertaining to you and your job become a part of your personnel record, which is maintained by the Personnel Services Department.

Your personnel record is important to your future with the District. Its contents are reviewed periodically and a promotion may depend upon the accuracy of the information it contains. Therefore, it is important that you help keep it up to date.

Please inform the Personnel Services Department promptly of schooling completed, unrecorded skills or abilities you develop, and personal data such as changes in name, address, telephone number, dependents, or beneficiaries.

Classified Service Employees Advisory Council

The Classified Advisory Council serves as an advisory body to the Chancellor and Board of Trustees on all matters not related to employee relations.

The council consists of members from each of the educational programs and the District Office. Members are elected to three-year terms and meet monthly. Suggestions or questions may be passed on to these members.

SUGGESTED READING

Publication	Author
YOUR PERFECT RIGHT	Albert, Robert
THE OFFICE IN TRANSITION	Becker, Esther
THE SUCCESSFUL SECRETARY'S HANDBOOK	Becker, Esther
THE HIGH PAID SECRETARY	Becker, Esther
HOW TO BE AN EFFECTIVE EXECUTIVE SECRETARY	Becker, Esther
GAMES PEOPLE PLAY	Berne, Eric
HOW TO WIN FRIENDS AND INFLUENCE PEOPLE	Carnegie, Dale
YOUR ATTITUDE IS SHOWING	Chapman, Elwood
THE FUTURE EXECUTIVE	Cleveland, Harland
HELPING OTHER PEOPLE CHANGE	Corey, Stephen
HUMAN RELATIONS AT WORK	Davis, Keith
BODY LANGUAGE	Fast, Julius
DON'T SAY YES WHEN YOU WANT TO SAY NO	Fensterheim & Baer
I'M OK -- YOU'RE OK	Harris, Thomas
THE OK BOSS	James, Muriel
HOW TO TALK WITH PEOPLE	Lee, Irving
MANNERS AT WORK	Leob, Robert
COMMUNICATIONS HANDBOOK FOR SECRETARIES	Mayo, Lucy
YOU CAN BE AN EXECUTIVE SECRETARY	Mayo, Lucy
EVERY EMPLOYEE A MANAGER	Myers, M. C.
BUSINESS ETIQUETTE HANDBOOK	Parker (editors)
WHAT'S A NICE GIRL LIKE YOU DOING IN A PLACE LIKE THIS?	Teitz, Joyce
THE SECRETARY'S GUIDE TO DEALING WITH PEOPLE	Vermes, Jean
HINTS FOR THE WORKING WOMAN	Cruse, Heloise
REFERENCE MANUAL FOR STENOGRAPHERS AND TYPISTS	Gavin and Sabin

Publication	Author
HOW TO DRESS FOR SUCCESS	Head, Edith
HOW TO RUN A MORE EFFICIENT SCHOOL OFFICE	Jones, Florence
WORK SIMPLIFICATION	Lehrer, Robert
INSTANT SECRETARY'S HANDBOOK	Luck, Martha
PSYCHO CYBERNETICS	Maltz, Maxwell
LEGAL SECRETARY'S COMPLETE HANDBOOK	Miller, Bessie
HOW TO BE YOUR OWN BEST FRIEND	Newman & Berkowitz
THE ROAD TO SECRETARIAL SUCCESS	Place, Irene
THE EFFECTIVE EDUCATIONAL SECRETARY	Priest, Jean
STRESS WITHOUT DISTRESS	Selye, Hanes
THE SCHOOL SECRETARY'S HANDBOOK	Smith, John
DEVELOPING YOUR EXECUTIVE SKILLS	Uris, Auren
SEX AND THE OFFICE	Brown, Helen G.
THE AMBITIOUS WOMAN'S GUIDE TO A SUCCESSFUL CAREER	Higginson & Quick
GOAL SETTING	Hughes, Charles
CAREER OPPORTUNITIES FOR WOMEN IN BUSINESS	King, Alice
HOW TO GET CONTROL OF YOUR TIME AND YOUR LIFE	Lakein, Alan
DEVELOPING WOMEN'S POTENTIAL	Lewis, Edwin
THE PETER PRINCIPLE	Peter, Laurence
THE PETER PRESCRIPTION	Peter, Laurence
UP THE ORGANIZATION	Townsend, Robert
WOMEN AT WORK	Winter, Elmer
HOW TO READ FASTER AND REMEMBER MORE	Young, M. & C.
LAW IN THE SCHOOLS (CALIFORNIA)	Younger, Evelle
THE ART OF READABLE WRITING	Flesch, Rudolph

Publication	Author
THE ELEMENTS OF STYLE	Strunk and White
TECHNIQUES OF DELEGATING	Laird and Laird
BETTER BUSINESS ENGLISH	Classen, H. George
PERSONNEL MANAGEMENT	Chruden & Sherman
PULLING YOUR OWN STRINGS	Dyer, Wayne
THE NEW ASSERTIVE WOMAN	Bloom, et al
TAKING CHARGE ON THE JOB	Taetzsch & Benson
THE SUCCESSFUL CREATIVE SECRETARY	Kristt, C.
SECRETARY'S BOOK OF INSTANT LETTERS	Vermes, J.

Magazines and Newsletters

WORKING WOMAN

WORKING MOTHER

MS. MAGAZINE

THE SECRETARY

CREATIVE SCHOOL SECRETARY (Newsletter)

As you discover other helpful resources to your personal and professional growth, add them to this list.

JOB DESCRIPTIONS AND RESPONSIBILITIES

CLASS SPECIFICATIONS

A classification plan is a way of systematically describing the positions and classes in a public agency. A **position** is a group of duties and responsibilities which are intended to be performed by one employee. A **class** is any number of positions (one or more) which are sufficiently similar in duties and responsibilities that the same job title, minimum qualifications, qualifying tests, and salary range are appropriate for all positions in the class.

A **position classification plan** attempts to describe the working situation at a given moment. It is derived from the smallest unit of organization--the position--whose characteristics, like those of the overall organization, are continually changing. Consequently, as job assignments to individual positions change, the classification plan should be reviewed accordingly.

The classification plan is a key personnel management tool which:

1. Serves as a basis for an organized and equitable salary plan.

2. Aids in recruiting and selecting qualified personnel. The description of each class, the "class specification," provides information to the District and to job applicants as to entrance qualifications for all classes, and helps the District determine what should be included in the examination process. It also enables current employees to see possible career ladders available to them.

3. Provides a basis for analyzing training needs, developing training programs, and fostering the development of a career service within the agency.

4. Provides information useful in the preparation, review, and control of a budget, and the clarification of organizational problems.

5. Assists management in planning for future growth and changes in services.

In classifying jobs, the basic concern is with what work is being done, not with whom, how much, or how well it is being done. The job itself must be analyzed, the job which actually exists as duties to be performed before an employee is hired to perform them. A position, then, is classified after a careful study of the duties and responsibilities assigned to the position, in which a number of allocation factors are used to assist in making the proper classification decision.

JOB DESCRIPTIONS

A written statement covering the duties and responsibilities of a single job is commonly referred to as the **job (or position) description.** While both the job description and the class specifications are sources of job information, it is the job description that serves to inform and to remind employees about the details of their duties and provides them with a guide for improving performance and preparing for advancement. Job descriptions can constitute an important personnel tool for supervisors in helping them to orient and train employees, to reconcile employee grievances, and to support disciplinary actions.

The job description enumerates in detail the duties that the employee is expected to perform, the equipment to be used, the quality standards to be met in doing a job, reporting relationships, and other important information necessary for successful job performance.

The job description can be developed objectively through the process of job analysis and compiled formally into class specifications and descriptions of duties. Another way the duties can be listed into a job description is to ask each worker to make up his/her own. After the descriptions are written and collected, the supervisor can review them to fill in any omitted details.

There is no standard form for the job description. However, the job description should at least contain the following sections:

Job Identification Section -- By means of job title and other identifying data, helps distinguish a job from the others within the District.

Job Summary Section -- Sometimes called the "statement of the job" and serves to provide a summary that should be sufficient to identify and differentiate the duties that are performed from those of other jobs.

Job Duties Section -- Major duties and responsibilities are covered by brief statements.

The feelings of satisfaction and recognition that a person derives from work are influenced to a large extent by the demands of the job. In organizing the work, it is important that each job be designed so as to permit the employee who is assigned to it to perform efficiently and to achieve a feeling of satisfaction and security. It is important, therefore, that duties, responsibilities, and performance requirements of each job be formally established so

that all workers and all supervisors understand clearly what is expected of them in the way of performance.

Even the job information that is prepared with great care will be of little value if it remains stored in the department files. Information concerning each job should be readily available to job holders and their supervisors.

Again, as job assignments to individual positions undergo significant change, the job description should be changed and kept up to date, and the position reviewed for proper classification (see Personnel Manual Guideline CC0001).

INSERT YOUR JOB

DESCRIPTION HERE

DESK JOB PROCEDURE

What would happen if you broke your leg today and had to be away from the office for two months? Would someone else be able to step in and do your job? Do you have tips in writing to help your substitute, or have you grown with your job and kept all the procedures and details in your head?

A description of your particular job, as opposed to a generalized job description, takes time to develop, but it will be invaluable to your office in your absence. Follow the suggestions below to make an outline of your job responsibilities and procedures ("desk procedure"), and insert a copy of your outline in this manual.

Suggested Organization of Job Responsibilities Section

1. Prepare an index page for the front of this chapter.
2. Divide this section with index sheets for quick reference.
3. Keep the description of duties up to date.
4. Put this entire manual in a place where you, your employer, or your substitute can locate it easily.

Questions to Help You Outline

When planning this part of the manual, ask yourself the six questions a good newspaper reporter would want to know if such a person were writing your job responsibilities for you: Who? What? When? Where? How? Why?

1. What is done and what are the priorities? Is all correspondence to be transcribed by 9:15 a.m.? Are all calendar appointments recorded if it means 25 trips a day into your boss's office?

2. When are things done? Deadline for monthly reports? The best time of week to work on timesheets? Part of the day for office quiet time and concentration?

3. Where are office supplies shelved, reference books housed, and completed projects put?

4. Who helps you, who is on routing slips, who are the office and District experts for emergency information?

5. How should things be handled and how could detail be cut in your absence?

6. Why are things done the way they are? Give reasons and background information if you can.

INSERT YOUR DESK JOB

PROCEDURE HERE

HELPFUL HINTS

TIME MANAGEMENT

Are you swamped with work all of the time? You just can't seem to get ahead on tasks that should be routine? Then maybe you should look into rearranging the way you approach and carry out your tasks. You need to know the right way to do a task and how to coordinate it with other tasks. Here are some tips from the Bureau of Business Practice to help you:

1. Plan your work and set priorities by making a list of jobs that must be done in the order of their importance. This way, if you don't have the time to do everything on your list, at least you will have completed the important things first.

2. Arrange your work in time blocks so you are doing as many similar jobs as possible at one sitting.

3. Schedule your most demanding assignments for your peak periods, those times of the day when you usually have more energy and are better able to concentrate.

4. Organize your work by work area and avoid moving constantly from one work station to another.

5. Arrange your work area, your desk, etc., to ensure a steady and easy work flow. Use folders, dividers and trays to organize paperwork and data.

6. Keep supplies and materials for the types of tasks you do most often near your desk. Keep most-used reference books near you and not across the room.

7. Concentrate on each top priority job individually. Don't worry about the others that are still to be done as this only reduces your efficiency and wastes time. Just start at the top of your list and work down.

8. Stay cool and calm under pressure. Easier said than done? If you do get uptight, get up, get a drink of water, stretch or do some muscle-relaxing exercises, walk around the building. Don't forego your breaks and cut short your lunch, as this is when you need it the most.

9. Look for shortcuts and try to find easier, faster, but efficient ways of getting your work done.

10. Slice your paperwork. Use the telephone to relay simple messages and reminders. Limit the use of the copy machine, and beware the habit of making extra copies "just in case." Keep your files organized and pared down. If possible, use concise, simple forms to process information. Whatever the purpose of forms, just be sure they are used to cut paperwork, not to increase it.

11. Learn to say "NO." Being too anxious to please only creates more problems. Give a polite explanation, but don't be afraid to say it. Don't be everyone's doormat.

FEELING FIT

Exercise is probably tne best of all possible prescriptions for emotional health, and it has been shown that physical activity provides a safe, nonthreatening way to learn the coping strategies needed in the world of work. A long-term California study shows that people who are physically fit and active have greater self-esteem than sedentary people. Active people are happier, less anxious, more secure and more confident. It is important to watch your eating habits as well. Exercise and/or vitamin supplements won't make up for poor nutrition.

The most common physical complaint among people with desk jobs, or those who sit any length of time, is tension headaches. When you sit at a desk all day, your neck muscles must be constantly contracted to support your head, creating abnormal tension. To loosen tense neck muscles, try writing the numbers one through ten with your head. Do it once or twice a day. It is an effective exercise for relieving this type of tension.

What use is a fine-tuned body if your head is a mess? Everyday worries and anxieties are a part of life; however, you need not let them get you down. Here are some simple strategies for turning around a blue day:

1. Leave your office and walk around.
2. Open a window (if they open) and breathe deeply.
3. Complete the one task you have been most avoiding. Feel smug once you have finished.
4. Take your breaks, and don't eat lunch at your desk.
5. Don't make a habit of trying to do two or more things at one time.
6. Set aside some period of time each day that is strictly for yourself and impress upon co-workers that this time is sacrosanct.
7. Don't expect to do everything right and on time, every time. Learn from mistakes.
8. Express anger and upset in an assertive manner (note we didn't say "aggressive"). Suppressed hostility is extremely harmful to your system. Clear the air privately with the individual(s) involved when there are problems.

DICTATION AND TRANSCRIPTION

Preparation

1. Keep steno pad and pens in one place where you can easily reach for them. A pen is easier to read than a pencil, and the point doesn't break. A pen also requires less muscular exertion and the notes preserve better.
2. Keep the pad open to the next clean page or use a paper clip or a rubber band. Have an extra pad ready if you are almost finished with the pad you are currently using.
3. Date each page at the bottom so you can easily find a specific date by flipping through the book.

4. If you take dictation from more than one person, it might be a good idea to use separate notebooks for each person.

5. Keep a notebook and pen in your employer's office. Then, if you're asked to take dictation while there, you will be able to do so without running back to your own work area.

6. Tape a billfold-size calendar inside your dictation pad. Then, whenever your boss is in doubt about a date, all you have to do is glance at your calendar.

Dictation

1. If you are left-handed, turn your shorthand book upside down, with the spiral end near you, and write in the right-hand column. This will leave the left-hand column for notes and makes it easier to flip pages over with your right hand as you reach the bottom.

2. How do you keep the shorthand notes separate from the miscellaneous duties and assignments given to you during the dictation process? There are several ways which are all effective.

   a. Take two shorthand books along, one for regular dictation and the other for the notes.

   b. Write only on the left side of your notebook, using the right notebook column for special instructions.

   c. Divide the shorthand notebook into four columns and use every other column, leaving space for inserting corrections or other comments.

   d. Write instructions, comments and notations in longhand so you won't confuse them with the dictated material.

3. Don't correct shorthand errors while taking dictation because you may miss an entire phrase. If you have enough letters down, you should be able to figure out the word.

4. If something doesn't sound correct or tactful, at the end of the letter ask if you may read it back and explain that you are not sure you took it down correctly. This will give the dictator the opportunity to hear how it sounds, and you will be saved a probable retyping job.

5. Repeat the spelling of unfamiliar names and addresses for verification at the time of the dictation, writing them in longhand.

6. When you are asked to make deletions, additions or corrections, number and circle each one and put a corresponding number in the text to show where the change should go. Circle references and enclosures so they are not forgotten.

7. To avoid leafing through all your notes to find the one letter that has to be done immediately, fold the page(s) containing the rush correspondence diagonally across the book. In this way, the pages will extend beyond the cover and you will be able to locate them immediately.

8. Number the items you take in dictation. This practice not only gives you a good idea of the work you have ahead to make your time management more efficient, but also eliminates overlooking a small item.

9. If you have questions, ask them all at the end of the session -- don't interrupt and don't wait until you're in the transcription phase.

Transcription

1. Transcription is IT -- your correctly transcribed, perfectly typed letter is the hallmark of a truly professional secretary who represents his/her office and the District in one of the most complimentary ways. Begin by organizing your desk and arranging all your transcription materials in an easy-to-reach spot. Clear your desk of other clutter.

2. Preview the material dictated. Put in the punctuation and capitalization, indicating paragraphs, etc. Look up the spelling of words, names, or reference material which must be checked. Insert all necessary changes.

3. Follow up on all special notations and instructions and type rush items first.

4. Have a plan to clarify confusing material or to get answers to questions. Set up a note system, perhaps, between you and your boss by clipping your inquiries to the files or papers about which you have questions. Leave ample space on the note for the reply and try to anticipate anything else you can do to make it convenient to answer your questions. If you leave your note and the backup material in a prearranged spot in your boss's office -- on the chair, near the phone, anywhere that both of you have agreed upon

and that is relatively clutter-free -- all your boss has to do is put a check mark beside the correct answer and you can continue with your transcription. If a note system doesn't fit into your office routine, sit down with your boss at a certain time each day (whenever possible) to discuss any questions that may have arisen during your preview or transcription.

5. Start a shorthand dictionary. When you are dictated an unusually difficult word or a word with which you are unfamiliar, write these down on a small pad and keep it handy for quick reference.

6. Try to cut down on rough drafts unless you are transcribing a speech or lengthy report or simply asked for a rough draft.

7. If you are transcribing minutes of meetings, transcribe assignments first for individuals to follow up on. Write and submit a rough draft as soon after the meeting as possible. Do not prepare a final document until your boss has reviewed and corrected any erroneous sections or pointed out any omission of important material.

8. Place the addressed envelope flap over the letter, along with copies and enclosures, and leave it face up on the boss's desk for his/her signature.

Transcribing from a Dictating Machine

Basically, follow the procedures above for transcription from shorthand notes. It may, in this case, be necessary to type drafts first. Some tips:

1. Be sure to start and stop as often as necessary until you get into the swing of it.

2. If the material is unfamiliar, listen to an entire section before starting to type. Don't guess at a word if you cannot hear it. Replay the fuzzy part until you are sure you know what it is. If you just can't figure it out, ask the dictator.

3. Don't transcribe something that doesn't make sense to you. Stop typing and listen ahead so you'll better understand how it fits into the whole picture. If you are still uncertain, ask.

TYPING

1. For fast, steady and pressured typing jobs, take a moment to rinse your hands in soap and warm water. This not only keeps your paper clean, but also relaxes the fingers, the hands, and the wrist muscles so they don't become strained and mistake-prone.

2. Do you want to type notations on your carbons but not on the original? Change the ribbon position to stencil and nothing will show on the original. Caution: Your type must be very clean.

3. The friction of an eraser on paper causes heat and heat is the main reason holes appear in erasures. Pause briefly between eraser strokes to let things cool off and you're less likely to wear a hole. Erase in one direction only, with a light upward stroke, following the grain of the paper.

4. Your typing position can affect your typing speed. Make sure you are sitting correctly. Be sure to sit back in the chair, lean slightly forward from the shoulders, feet slightly apart on the floor, and your chair positioned and ajusted correctly so you don't have to bend your wrists.

5. **Relax.** Economize your efforts. Aim at keeping your hands and wrists relaxed, almost motionless, while your fingers tap the keys. Use a quick, sharp stroke and don't move your hands from row to row or move your fingers far from their home keys.

6. Think in word blocks whenever possible. Don't type one letter at a time.

7. To prevent a small item, such as a label, from getting caught in the platen, take a sheet of paper and fold it up two-thirds of the way. Then fold the folded edge about one inch or less, depending upon the size of the item to be typed. Insert the folded sheet in the typewriter beyond the double fold, insert the label (or whatever small item it is) into the "pocket" and type. No more slipping into the maw of the machine.

8. There are those times when you need to emphasize facts, figures, or information. Several special effects you can produce on your typewriter are:

   a. Tabulation -- Numbers, dollars, percentages.

b. Indentation -- Indentation from the left-hand margin sets instructions or special information apart from the rest so that it doesn't become buried in the paragraph.

c. Enumeration -- Useful when giving instructions or a point-by-point discussion of information and increases the likelihood that your reader will remember each step or point.

d. Underscoring -- Used for emphasis of a single word, phrase, or entire sentence. Don't overuse or you lose the effect.

e. All caps -- Another way to be emphatic. Also use sparingly.

9. Some suggestions on typing symbols that probably aren't part of your typewriter keyboard:

a. Brackets [ ] -- Strike the underscore, backspace, and strike the diagonal. Roll the platen up one full line and strike the underscore. With the platen still rolled forward, make two spaces and strike the underscore again. Roll the platen down one line, backspace and strike the diagonal. Backspace two spaces and strike the underscore.

b. Caret _/ -- Strike the underscore, then the diagonal.

c. Degrees 75° -- Roll the platen backward slightly and strike the letter "o".

d. Division sign ÷ -- Strike the colon, backspace, and strike the hyphen.

e. Paragraph marks ¶ -- Type a capital P, backspace, and strike the letter 1.

10. When you are typing masters for fluid duplicators, and you want to display some portions of the material in color, place a sheet of colored duplicating carbon between the white master paper and the carbon sheet before typing the part that is to be so displayed. Don't forget to remove the slip of colored paper.

11. When you are typing stencils and having problems with pressure, it may be that you are using an old, dry stencil or a very cold one. For best results, keep stencils in their carton and stand the carton upright. Keep them in

a place where the temperature is moderate; avoid placing them in direct sunlight or near a radiator or a cooling vent. Be sure nothing is stacked on top of them.

12. A typewriter that isn't functioning properly can cause you a great deal of grief. The repair records of the major typewriter manufacturers recommend simple and obvious precautions in taking care of your machine. Follow a ten-minute routine each morning by cleaning with a long-handled brush all the parts which can be reached, moving the carriage from side to side. Use a cloth to wipe carriage rails and tops of keys. It is also recommended that you clean the platen at least once a week using a damp, clean cloth and alcohol. Also use alcohol to clean the rubber rollers.

    Overall care includes having the machine checked regularly by professionals for correct alignment of keys, etc. Try to keep erasure dust from inside the machine, as well as liquid type cleaner; don't yank paper out of the machine; keep machine away from heat or direct sunlight; turn off electric machines each time you are finished typing; and never use alcohol on the outside of the machine.

13. When typing on several carbons copies at one time, or on a mimeograph stencil with film and plate, try using an envelope to keep all of the copies together. Line up all the various pieces, open the envelope flap, place the envelope flap over the top of the pieces, roll all the pieces through inside the envelope, then remove the envelope after everything is in place in the typewriter.

14. If you prepare multiple copies of letters or legal forms requiring many signatures, attach paper clips, colored brads, or file flags at the line where each signature is to appear.

15. Pica type has 10 digits to one horizontal inch.

    Elite type has 12 digits to one horizontal inch.

    There are 6 lines of typing to one vertical inch.

    There are 85 horizontal pica spaces on a page 8-1/2" wide.

    There are 102 horizontal elite spaces on a page 8-1/2" wide.

    There are 66 vertical lines on a page 11" long.

PREPARING CAMERA-READY COPY FOR DUPLICATING

1. Make sure you get a dark, even impression on white paper. A carbon or mylar ribbon will give the best results.

2. Typewriter keys must be clean.

3. When your original copy is made from paste-ups, position the paste-up onto a white sheet of paper. If you use guidelines to position the paste-ups, use very light green, blue or yellow as they will not show on the printed copy.

4. Rubber cement, glue stick, or cellophane type "double-stick" tape should be used when pasting up. It is not necessary to completely seal edges down.

5. Use white correction fluid to get rid of unwanted marks, smears, smudges, and shadow lines.

6. Use smooth bond paper, 20-80 lb. originals. Make sure your original is not torn, folded, bent at the corners, or damaged from staples.

7. Each page number should be positioned in the same place; always number your two-sided originals so that the fronts are odd-numbered and the backs are even.

8. Leave adequate margins, at least 1/4" on all sides.

9. Make sure all your originals are the same size if the machine to be used to duplicate feeds automatically.

10. Reduce large originals down to a more easily handled size (charts, diagrams, computer printouts, ledger sheets). Type lengthy documents on oversize paper and then reduce to standard size.

11. Use overlays to add, delete, or change information on your originals.

12. On documents with printing to the edge of the page, reduce to 98%.

13. Use blank paper for originals which will be copied on letterhead paper.

FORMS DEVELOPMENT

Save time and labor by developing forms for those projects that require many items of information on one page. The best way to put a form together for your office is to know about the mechanics of spacing, organizing the message, and constructing the finished product to do its particular task.

1. Spacing - Horizontal and vertical spacing is determined by the amount of material to be filled in and the printed matter, such as box captions, column or section headings, and the text. The writing method (handwritten, typed, other) determines the amount of space to be allowed for fill-in data, while the amount of characters per inch of the typeface used determines the amount of space to be allowed for printed matter.

   a. Horizontal spacing is based on the number of characters written per inch. There are 12 characters of elite type to the inch and 10 characters of pica. Therefore, when counting horizontal spaces, allow 1/2" for elite and 1/10" for pica.

   b. Vertical spacing is based on the number of writing lines that can be written per inch. There are six vertical lines per inch on either pica or elite. Therefore, allow 1/6" or its multiple for each line of typing.

2. Color - To suggest action, use red, orange and yellow. Blue, green and purple imply prestige, dignity and relaxation. Tints suggest lightness and airiness, while darker colors imply stability and weight (although it is important to use dark colors carefully). Color choices can be matched to the season--warm in winter and cool in summer. Generally, men prefer shades and cool colors; women prefer tints and warm colors.

3. Typing Element - IBM recommends the following typing elements for the preparation of forms: Artisan 12, Courier 12, Dual Gothic, and Manifold 72 (010).

4. Paper Selection - Bond paper (chemical wood), 20 weight, is a good selection for forms. Another good selection is bond (25% rag), 20 weight, which has a smooth surface, great strength, exceptionally good folding and erasing qualities, and is resistant to discoloration from age. Both are recommended for general use forms and are good for two-sided copying.

5. Forms Checklist - In developing forms, ask yourself the following questions:

   a. Do typefaces insure good readability and appearance?

   b. Is the title placed where it can be readily seen?

   c. Are pages of a multiple-page form numbered?

   d. Is the form a standard size?

   e. Does the horizontal and vertical spacing conform to the writing method to be used (typewritten, hand-written, other)?

   f. Is the form designed so that it will not be necessary for the typist to space through captions or roll the typewriter platen up to see the caption and roll it back to make the entry?

   g. Does the typing start from a common left position?

   h. Are vertical rules aligned to reduce tabular stops to a minimum?

   i. Have the columnar arrangements been considered for using space advantageously for both reading and writing needs?

   j. Are boxes, column headings, sections and parts of the form identified by letters and figures?

   k. Are entry spaces which are not to be used blocked out or instructions supplied?

   l. Have the different ways of placing "X" boxes been considered to insure the best arrangement?

   m. Has sufficient space been allowed for certification, signatures, titles or dates?

   n. Are "To" and "From" boxes used to make the form self-routing?

   o. Are copies in a set of forms identified to make them self-routing?

   p. Does a self-mailer form meet postal requirements, and is the address in the proper position?

q. Does the form request the respondent to give a change of address to keep the mailing list up to date?

r. Have sufficient margins been used on a form which is to be punched for filing in a binder?

s. Has consideration been given to folding a large form to standard size to fit into standard equipment, binders, or folders?

t. Has the correct weight, grade and color of paper been chosen to perform the particular job efficiently?

u. Is there sufficient contrast between the paper and ink to insure good readability?

v. Has the use of the form and the method of filing or binding been considered in determining whether a two-sided form is to be printed head-to-head, head-to-foot, or head-to-side?

w. If printed on both sides, have margins been properly specified for each side?

6. Continually evaluate the value of your office forms and redesign or eliminate them as necessary.

RESOURCES

DISTRICT POLICIES AND PROCEDURES

Policies and Procedures are the primary and permanent governing documents published by the District. They are established by Policy 2002, Governance Publications, December 8, 1976 and implemented by Procedure 2002.2, Governance Publications Program, December 8, 1976.

Policies are established by the Board of Trustees to implement the District's programs. Policies are adopted, amended, superseded, repealed, or suspended at regular or special meetings of the Board. A policy is a formal statement of intent which provides clear direction for a specific program without neutralizing the administrator's professional skills in day-to-day operations.

Procedures are the instructions which implement policies, set responsibility, and prescribe systems. Procedures tell who does what, when and where. They leave little room for individual deviation.

Other District publications include the following: (1) Guidelines--formal instructions, generally advisory, intended to provide consultation in a limited area; (2) Manuals--explicit steps needed to carry out a task; (3) Bulletins--an official publication issued by an authoritative source to provide information to users of the services administered by the issuing authority.

A listing of current Governance Publications is published in January of each year. The publication file is maintained current

via a Publications Bulletin which is published each month. This process provides a new listing each January and a monthly bulletin updating the listing. A file of these publications may be maintained at any level of the District. To establish a file, the supervisor of an office must appoint in writing a specific person to maintain the file and send a copy of the appointment memo to the Policy/Procedure office. This will ensure distribution of updated information to the file.

WHERE TO FIND COMMONLY NEEDED ITEMS AND INFORMATION

1. **Obtaining an Affirmative Action Officer for Screening and Interviewing**: File a request with the District's Affirmative Action Office for an Affirmative Action Officer to sit on a committee. Make the request at least 24 hours in advance. Include the Affirmative Action Officer's name on the Criteria/Interviewing form prior to submitting to Personnel.

2. **College Applications**: Applications can be obtained at the Admissions Office at each college. Some satellite locations also have applications.

3. **Communications Office Information**: The District Communications Services Office is organized to provide services to the District offices. Regularly published information includes:

   Communicator--This publication is designed to carry information from administrative District offices and the Board of Trustees. It is published following Board meetings and is distributed to all District staff.

   Calendar of Events--Reports on interesting events happening in the District; includes items about District staff members, honors, awards, etc.; contains a calendar of upcoming events and regularly scheduled meetings, and also contains classified ads for District employees. This newsletter is distributed once or twice a month to all District staff, advisory committees, and other concerned people.

Management Memo--Contains information from the Chancellor, reports decisions from the Directors'/Presidents' Cabinet meetings. It is distributed to administrators and management.

With Excellence (WE)--This publication contains information of general interest regarding the District's activities and the Annual Report. It is published four times a year and distributed to all staff, citizens councils, and other individuals, depending on the focus of issue.

Communications Services also develops and issues News Releases and Public Service Announcements.

Talented staff members with skills in writing and editing, graphics, or photography can assist District offices in solving communications problems or in developing specialized publications.

For more information, contact the Communications Services Office, located at Stadium Plaza.

4. **Duplicating Services**: Three presses and three full-time operators provide services on a Districtwide basis at Stadium Plaza. Service is provided primarily for copies exceeding 100 per master, materials for sale in student bookstores, or work requiring specialized or difficult set-up. To use this service, take your photo-ready copy, along with a completed Request for Duplicating Work, to the Duplicating Supervisor at Stadium Plaza. Please allow sufficient lead time for completion of your work. The Duplicating Supervisor is trained to assist District staff in securing the best possible job and in saving time, effort, and money. If you have special requirements or need assistance with setting up a job, please contact her.

   Midway Adult Center also offers duplicating services through its Graphics Arts class. Call Midway Adult for more information.

   The major campuses each have their own services to assist staff with their duplicating and clerical needs. Contact each campus for further information.

   For helpful information on preparing camera-ready copy for duplicating, see the HELPFUL HINTS section of this manual.

5. **Filling Position Vacancies**: The correct procedure for filling classified positions is defined in the Personnel Manual. Administrative positions are filled according to Policies and Procedures directives. The Request to Fill form, the job description, criteria and interview questions originate in the office where the vacancy exists.

   After the applications are screened, selected candidates are interviewed. From those interviewed, candidate(s) are selected for the position. The final decision is made in accordance with individual site procedures. Personnel Services notifies the new employee by telephone and sends a memo to the other candidates. For further information, contact Personnel Services at Stadium Plaza.

6. **Financial Aid**: Information on student loans, etc., is found at Financial Aids offices on each campus. Financial Aid is processed through these offices.

7. **Media Information**: Media information can be obtained from the Media Specialist located at Stadium Plaza. Services include graphic arts, slide shows, audio tapes and TV programs. Only materials are charged; there is no charge for labor.

8. **Student Activities**: The Associated Student Body (ASB) office on each campus publishes information and circulates announcements regarding student activities.

9. **Disabled Student Services**: In addition to the Resource Center for the Handicapped located at Stadium Plaza, the District has a Disabled Student Services Office on each major campus. For information regarding supportive services for disabled students, or any information regarding the disabled, contact your campus Disabled Student Services Office or the Resource Center for the Handicapped. The Resource Center also houses a complete library on disabilities, which includes over 1,100 books, pamphlets, periodicals, bibliographies, and directories.

10. **Word Processing Services**: The Word Processing Center is designed primarily to serve Stadium Plaza. However, special arrangements may be made to take work from the colleges/centers. Services available include typing letters, agreements, manuscripts, budgetary documents, charts and graphs, docket items, etc. Work may be stored for quick retrieval and future use. The originating office determines how long recorded copy is retained. Work is usually completed the same day unless it is a lengthy project; some work is completed within four hours. Special arrangements may be made for high-priority jobs. For more information, contact the Word Processing Supervisor or the Administrative Services Supervisor at Stadium Plaza.

RESOURCE BOOKS

1. **AV Materials Catalogs**

Adult:	Resource Library
ECC:	Audio Visual Services
City:	Audio Visual Services
Mesa:	Audio Visual Services
Miramar:	Instructional Learning Resource Center

2. **Budget Charge Number Book:** Budget Office, Stadium Plaza.

3. **Board Docket Manual:** The Board Docket Handbook is available in the Board Docket Office, Stadium Plaza, and in each office responsible for submitting docket items for the Board of Trustees.

4. **Business Services Manual:** This information is part of the Policies and Procedures Manual, 8000 Section. Copies of this manual are located in each office and Administrative Services, Stadium Plaza.

5. **Directory of District Councils and Advisory Committees:** These lists, which are revised yearly, are available in the Affirmative Action Office, ECC. Each office of the District has a copy.

6. **Identity Specification Manual:** Copies of the manual are available in the Communications Office, Stadium Plaza, PR offices, and most deans' offices.

7. **Personnel Manual:** Personnel Manual supplement to Policies and Agreements. Copies available in Personnel Services Office, Stadium Plaza, offices of Directors, Presidents, and Business Managers.

8. **Timekeepers' Desk Manual:** Available from Personnel Services, Stadium Plaza. Copies are distributed to all persons associated with Timekeeping and Payroll operations.

9. **Other District Manuals:** Other District manuals which are issued by Directors to provide explicit instruction are:

Manual of Policies, Procedures and Standards for Computing Services: Available from the Computing Services Office, Stadium Plaza.

Policies and Procedures for Student Organizations: Available from the Student Services Office, Stadium Plaza.

Insurance Manual: Available from Communications Services Office, Stadium Plaza.

EMPLOYEE CONTRACTS, AGREEMENTS, AND HANDBOOKS

The primary written documents which govern the relationship between the District, as an employer, and its employees are the Contracts, Agreements, and Handbooks.

All District employees are members of a designated unit. The units are arranged by position classification. If questions arise concerning the "terms and conditions of employment," you should first determine the unit to which your position is assigned and then research the question in the appropriate Contract, Agreement, or Handbook.

Insert a copy of your Contract, Agreement, or Handbook in this section for referral.

DISTRICT CALENDAR

For easy referral, insert the District and/or Adult Education calendar for the current year in this section.

Insert in this section any other information you and/or your individual office would find helpful.

INSERT THE DISTRICT

CALENDAR HERE

INSERT YOUR BARGAINING

UNIT CONTRACT HERE

TELEPHONE

Every time you make or receive a telephone call, you are representing your employer and the San Diego Community College District. Every telephone call creates an impression, good or otherwise, of the entire organization. We all have a personal responsibility to make these impressions as favorable as possible. The following pointers on telephone communications will help you to handle routine, complex, and sometimes difficult telephone contacts.

The Importance of a Pleasing Voice - Few of us are born with voices like angels, but we can all improve the voice and speech habits we have. To help you train your telephone voice to be an asset to you and your office, put these suggestions to use when you pick up the receiver.

1. Relax. If your voice is tense, the tone will be quivering or stifled, causing you to sound uncertain and frightened.

2. Smile when you speak. Envision your caller in front of you and address that person as you would a visitor to your office--with a pleasant and friendly voice.

3. Be courteous. Address your callers with respect, using the common courtesy titles and also business titles when they are known. Use simple, straightforward language, avoiding technical terms and slang.

4. Pace your speech. Be especially sure that you don't speak too fast on the phone. You want to be sure that you are heard clearly. Speak directly into the telephone transmitter, pronouncing your words clearly and distinctly.

Answer Promptly - Make the first impression a favorable one by answering at the first ring, if possible, and be ready to talk to the caller. If you are delayed in answering the phone, be sure to apologize to the caller for keeping him/her waiting.

You may be taking one call when a second comes in on another line. Wait for a break in the conversation, announce that you have another call, and ask to be excused for a moment. Wait for the first caller to respond before pushing the "Hold" button. Then take the second call. Apologize to your second caller for keeping him/her waiting, explain that you have a call on your other line, and ask the caller to wait for a few minutes. If you expect to be tied up for more than a minute on the other line, give the second caller the option of calling back at a more convenient time.

Proper Identification - Identify the office and yourself--"Mrs. Martin's office, Miss Brown"--clearly and pleasantly. You'll find that answering the telephone with your name prompts the caller to identify by name too.

Telephone Coverage - When you leave your desk, particularly for periods of 15 minutes or longer, inform the person who is to answer for you where you are going and when you will return. Give prompt attention to your telephone messages when you return.

Transferring Calls - None of us likes the proverbial "runaround," so transfer calls only when necessary. Begin by telling the caller why and where you are transferring the call. Then transfer the call, using the method prescribed for your telephone system.

Taking Messages - Always keep your message pad handy and record the details accurately and completely while they are being given by the caller. Do not rely on "mental notes."

Request, rather than demand, information. Such phrases as "What's your name?" or "Repeat that, I didn't get it," sound abrupt when compared to "May I have your name please?" or "Would you mind repeating that information?"

It is especially important to be accurate if the message requires action on the part of your boss. Repeat the information to the caller to be sure that you have the correct information. Be sure to include the following:

1. Date and time of call.
2. Complete name of caller, spelled correctly.
3. Telephone number of caller.
4. Business affiliation of caller.
5. All pertinent information so that the person for whom the call was intended will know what action to take or what to expect when returning the call.
6. Your initials on messages for your employer and your full name on messages for others.

Placing Calls on Hold - If you must put a caller on hold, be sure to explain why you are leaving the line and approximately when you will return. Expressions such as "Hold on" or "Just a second" tell the caller nothing. When you return to the line, alert the caller to the fact that you are back by using a suitable introductory

phrase, such as "Thank you for waiting." Apologize for unavoidable delays. If you know you will be away from the telephone longer than a minute or two, offer to call back, stating the approximate time you will call.

Outgoing Calls - Plan your call before you make it. Knowing beforehand what you are going to discuss will make your call brief but effective.

If you are connected to the called person's secretary, announce who is calling. For example: "Mr. Smith from Mesa College is calling Mrs. Brown." If you reach the person, announce your employer. For example: "Mr. Smith of Mesa College is calling you, Mrs. Brown. Here he is."

Long Distance and Special Calls - A prime consideration in making long distance calls is the cost. Keep in mind these tips for controlling telephone costs in your office:

1. Be aware of telephone time rates and time zone differences. Although most of your calls will be made during the prime rate hours, 8 a.m. to 5 p.m., take advantage of discount rates whenever you can. For example, someone in San Diego can make a discounted call to Kansas City at 7:55 and reach the other office at 9:55--right in the middle of their morning work hours. Similarly, do not attempt to place a call to Washington, D.C. at 4 p.m. San Diego time; you will reach an empty office. Please refer to Attachment C for a United States Time Zone map.

2. Place long distance calls yourself. The do-it-yourself direct dialing is the cheapest rate going at any time of the day. However, if you have trouble reaching a number, you can tell the operator and request "Assistance in dialing, please" at no additional cost.

United States Time Zone Map

ATTACHMENT C

ZIP CODE ABBREVIATIONS

AL	Alabama
AK	Alaska
AZ	Arizona
AR	Arkansas
CA	California
CZ	Canal Zone
CO	Colorado
CT	Connecticut
DE	Delaware
DC	District of Columbia
FL	Florida
GA	Georgia
GU	Guam
HI	Hawaii
ID	Idaho
IL	Illinois
IN	Indiana
IA	Iowa
KS	Kansas
KY	Kentucky
LA	Louisiana
ME	Maine
MD	Maryland
MA	Massachusetts
MI	Michigan
MN	Minnesota
MS	Mississippi
MO	Missouri
MT	Montana
NE	Nebraska
NV	Nevada
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NY	New York
NC	North Carolina
ND	North Dakota
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VT	Vermont
VA	Virginia
VI	Virgin Islands
WA	Washington
WV	West Virginia
WI	Wisconsin
WY	Wyoming

3. Call when you're reasonably certain the person you are contacting is available. Schedule your calls with the other party whenever you can. If you don't reach your party the first time, try to avoid having them call back collect. It is cheaper for you to dial direct again than to accept a collect call.

4. Be prepared when you call. Know exactly what you want to say before you pick up the phone.

5. Report wrong numbers, bad connections and cutoffs to the operator immediately. Explain the situation and give the number from which you are dialing. The operator will arrange for a credit.

Be Tactful - Comments such as "He hasn't come in yet" (at ten in the morning), "She's not here and we don't know where she is," or "He has left for the day" (at three in the afternoon) can give the wrong impression. It is better to say "Ms. Johns is away from her office right now. May I ask her to call you?" or "Mr. Jones will not be in today. May I take a message?" or "She stepped out for a few minutes. May I take a message or ask her to call you?"

Screening Calls - When it is necessary to screen a call, be sure to do it properly. This procedure can cause a loss of goodwill and be a source of irritation to the caller. A good way to ensure caller satisfaction is to offer a complete explanation, and immediate assistance and/or a call-back. Here are some suggestions to help you screen calls effectively.

1. If your boss accepts all calls but wishes to know the name of the caller before being connected, say something like "May I tell him who's calling please?" Avoid the challenge "Who's calling?" No matter how pleasing your voice may be, the challenge itself gives an impression of abruptness and discrimination.

2. When your boss wishes to be available only to certain individuals, use a tactful initial question such as "He's not available at the moment, may I tell him who called?" This approach will avoid embarrassment and loss of goodwill. If the caller is someone with whom your boss wishes to speak, it enables you to add "Here he is now" or "I'll see if I can get him for you."

Personal Calls - Personal calls to family, friends, or others take your time away from work to be done, can be distracting to others, and tie up office business lines. Limit these calls to emergencies or urgent business. Calls may be made away from the office or at an unoccupied, preferably private area during breaks or lunch periods. If a personal call is necessary, be as brief as possible.

ENGLISH

The purpose of this section is to obtain consistency in usage of the items noted below. Please use these rules when preparing all District letters, memos, reports, and Board docket items.

For other rules of grammar, spelling, word usage, etc., not shown below, consult your dictionary or one of the references named in the Introduction.

CAPITALIZATION

1. Adult Centers:

   North Shores Adult Center
   East San Diego Adult Center
   Navajo Adult Center
   North City Adult Center
   Centre City Adult Center
   Centre City Skills Center
   Educational Cultural Complex
   Midway Adult Center

   When talking in general about an adult center, use lower case. For example:

   Courses in that subject are taught at all the adult centers.

2. Board of Trustees:

   Always capitalize Board when referring to SDCCD Board. For example:

   Board of Trustees of the San Diego Community College District; and

   The Board met on May 9 . . .

When referring to boards other than the SDCCD Board, use lower case. For example:

The board of trustees of the Kern Community College District; and

Their board voted to . . .

3. Colleges:

San Diego Mesa College

San Diego City College

San Diego Miramar College

San Diego Evening College

When talking about colleges in general use lower case. For example:

The governing board of a community college district may establish a resolution . . .

4. Committees:

Law Enforcement Advisory Committee

Lower case committee when it stands alone. For example:

The committee voted to . . .

5. Councils:

District Executive Council

Instructional Council

Lower case council when it stands alone. For example:

Members of the council recommended . . .

6. Courses/Subjects:

Capitalize names of courses. For example:

English 119

Accounting 101

Physical Anthropology 2B

Capitalize subjects only when derived from proper names. For example:

They are studying history, algebra, English and Latin.

7. Departments:

Vocational Education Department

Personnel Services Department

English Department

Lower case department when it stands alone. For example:

The department is charged with the responsibility of . . .

8. District:

Always capitalize District when referring to the SDCCD. For example:

The San Diego Community College District;

The District Office (Stadium Plaza); and

The District has many new programs.

When referring to other districts, capitalize the full name; however, lower case the word "district" when it stands alone. For example:

The Kern Community College District; and

Their district is facing an enrollment decline.

9. Governmental Terms:

Federal - capitalize when part of a title. For example:

The Federal Register (a publication); and

The Federal Bureau of Investigation

Capitalize when it identifies a specific government. For example:

The Federal Government

Lower case when used in a general way. For example:

federal funds, federal courts

State - capitalize state when it is part of a name and when it stands alone if you are referring to a specific state. For example:

The State of California (a legal entity);

State funds; and

The State budget

City and County - capitalize these words when using the full title of these agencies. Lower case when they stand alone. For example:

The City of San Diego (legal entity);

The County of San Diego (legal entity);

The city and county governments; and

I visited the county office yesterday.

10. Position Titles:

Capitalize when referring to specific individuals. For example:

Garland P. Peed, Chancellor;

Chancellor Peed stated . . .;

The President of Mesa College;

The Director of Personnel Services; and

Sharon Martin, Clerical Assistant II

When used in general or plural context, use lower case. For example:

The clerical assistants at City College;

Several of the presidents will meet today; and

As a clerical assistant, Ms. Martin was . . .

11. Seasons:

Capitalize seasons only when they are personified. For example:

The gentle touch of Spring

Otherwise, lower case seasons. For example:

spring semester;

fall semester; and

summer session

PUNCTUATION

1. Quotation Marks:

Periods and commas always go inside quotation marks. For example:

John said, "Please close the door."

He was considered to be a "weirdo."

Charles, also known as "Chuck," works in the Art Department.

Semicolons should be placed outside quotation marks. For example:

The door is marked "Private"; that's a word we respect around here.

If a question mark, an exclamation point or a dash applies to the quoted matter, place it inside a closing quotation mark; otherwise, place it outside. For example:

"What is your sister's name?" he asked. (The quoted portion is a question.)

Did he say, "Our population exceeds one million"? (The entire sentence is a question, but the quote itself is not.)

2. Semicolons:

Use semicolons with the words "however" and "therefore." For example:

I will be happy to have lunch with you; however, I may be a little late.

I knew I'd be late for work; therefore, I telephoned my supervisor.

Use semicolons with abbreviations i.e., and e.g. (i.e. means NAMELY or THAT IS; e.g. means FOR EXAMPLE, FOR INSTANCE). For example:

Certain things are bad for a person's skin; e.g., too much sun, too much chocolate, etc.

Losses were due to several negative factors; i.e., inflation, competition, and regulations.

Two important District abbreviations are ADA and FTE; i.e., average daily attendance and full-time equivalent.

3. Hyphens:

The current trend is not to hyphenate, but to run the words together. Following are some examples used frequently in the District.

Districtwide	A Districtwide report
Statewide	A statewide sampling
Nationwide	A nationwide search
Interdistrict	An interdistrict transfer permit
Audiovisual	Audiovisual equipment
Full time	The clerk works full time
Full-time	She is a full-time clerk
Follow up	Please follow up on the report
Follow-up	This is a follow-up report
Overtime	She had to work overtime
Over time	Over time, her skills improved
Off campus	The dean has gone off campus
Off-campus	An off-campus class is being held
Percent	Percent is one word
Weekend	Have a nice weekend
Time card	Time card is two words
Time sheet	Time sheet is two words
Work load	Work load is two words
Workday	Workday is one word

Compound adjectives--two or more words used as an adjective before a noun are hyphenated. For example:

An up-to-date calendar; and

The calendar is up to date (not hyphenated following a noun)

4. Comma:

#1 Basic Rule: Use commas where you would pause in a sentence.

#2 Basic Rule: Use commas to set off words that could be logically removed from a sentence.

For example:

Several of us, because we had heard the news, expressed concern about the future.

Members of a series -

You have done your work with vigor, enthusiasm, accuracy and intelligence.

Appositives -

Our representative, Mr. Wallace, will call you next week.

Explanatory expressions -

Mr. Henricks, the third person in line at the second window, is my boss.

Adverbial expressions -

I believe, for the most part, that you are right.

Expressions coming between parts of a quotation -

"I will be there," he said, "if I can possibly arrange it."

Direct quotations -

He said, "I will be there if I can possibly arrange it."

Inverted or transposed expressions -

To make your shopping more enjoyable, we have installed air conditioning.

Direct address -

Mr. Jennings, I know you will understand the factors underlying this decision.

Between words when the verb is omitted -

Some delegates will arrive Friday evening; others, Saturday morning.

Before the second independent clause in a compound sentence -

Fish abounded in the lake, and the shore was lined with deer.

EXCEPTION: Do not use a comma if the sentence is very short; e.g., He walked and she rode.

Before the second phrase in a complex sentence -

I will finish this term paper, even if I have to stay up all night.

To set off an adverbial clause that precedes a main clause -

When she found that her friends had deserted her, she sat down and cried.

To separate adjectives and phrases modifying the same word -

It was a bright, beautiful, sunny day.

To separate a tag question from the rest of a sentence -

It's been a fine sales conference, hasn't it?

WORD PAIRS THAT ARE OFTEN CONFUSED

1. Accept - Except

Accept means to receive with approval, to reply to affirmatively, or to agree to. For example:

I am glad to accept this responsibility.

Except means to exclude or to make an exception of. For example:

Everyone will attend except John; and

It is only fair to except him from this requirement.

2. Adapt - Adopt

Adapt means to adjust or make suitable. For example:

Perhaps we can adapt this plan to our needs.

Adopt means to take over or to accept. For example:

The Board will adopt the recommendations submitted.

3. Affect - Effect

Affect is a verb meaning to influence. For example:

Any cut in our budget will seriously affect our sales.

Effect is either a verb or noun. As a verb, it means to bring about or accomplish. For example:

We must try to effect a closer relationship between them.

As a noun it means influence or result. For example:

The new legislation will have a reasonable effect on us.

4. Appraise - Apprise

Appraise means to set a value on or to estimate the worth or amount. For example:

The first step is to appraise the loss caused by fire.

Apprise means to inform or give notice of. For example:

Please apprise all staff members of this new rule.

5. Council - Counsel

Council (noun) means an advisory or legislative body. For example:

A council of experts was appointed; and

The Instructional Deans attend the Instruction Council meetings.

Counsel (as a verb) means to advise. For example:

> The director will counsel with the employee about the job.

Counsel (as a noun) means advice. For example:

> We will appreciate your counsel for this problem.

As a noun, counsel also means adviser or consultant. For example:

> I am going to consult with legal counsel; and
>
> Our District's legal advice comes from County Counsel.

6. Principal - Principle

Principal is either a noun or an adjective. As a noun, it means a capital sum invested or borrowed at interest. For example:

> He invested the principal and was able to live off the interest earnings.

Also as a noun, principal is used in the sense of a leader or one in control or authority. For example:

> He is the principal of the school.

As an adjective, principal means chief, main, or foremost. For example:

> His health was the principal factor in his resigning.

Principle means a general or fundamental truth or basic concept. For example:

> The basic principles of the Constitution are freedom and equality.

CORRESPONDENCE

All District offices should follow as much as possible the correspondence styles suggested in the following pages, so that there will be consistency and uniformity throughout the District. A sample of each type of correspondence that you will be required to prepare is included at the end of this section. The information presented below is meant to clarify and amplify each sample and should be read along with the sample(s) to which it refers.

LETTERS

Samples 6-10, which relate to letter format, include the following: a) sample letter--block style, b) sample letter--modified block style, c) second page format, d) alternate second page format, and e) a backup sheet to use as a guide to letters.

Inside Address. Type the inside address not more than 12 spaces and not less than four spaces below the date line. Carry over a long inside address to a second line, indenting two spaces. For example:

California Community and Junior
College Association
2017 "O" Street
Sacramento, California 95814

or

Sacramento, CA 95814

Attention Line. The attention line is placed two spaces below the inside address and just above the salutation, as follows:

ABC College
1446 Saratoga Place
San Diego, CA 92107

ATTENTION: Mr. John Doe, President

Subject Line. Include a subject line whenever possible. Type the subject line in all caps, underlined, flush with the left-hand margin, and two spaces below the salutation. Do not use the words IN RE or SUBJECT. Subject lines should not extend beyond the center of the page. Indent three spaces if necessary to carry over a long subject line. For example:

One-line subject — FTE INSTRUCTOR POSITIONS

Two-line subjects — ADA ALLOCATIONS FOR THE
1980-81 COLLEGE YEAR

Margins. Margins should line up with letterhead.

Enclosures. Type the enclosure notation at the left margin, two spaces below the identification line. If desired, list the titles of the enclosures or attachments, or follow the words "Enclosures" or "Attachments" with the number. For example:

Enclosure

Enclosures: Student Grade Report
Grade Roster

Enclosures (2)

Carbon Copy Notation. Type the carbon copy notation two spaces below the enclosure notation. The last line of typing should be one inch from the bottom of the page. When sending carbon copies to a number of people, list the names vertically, beginning with the individuals outside of the District. The Board of Trustees and Chancellor should be listed next, if they are included, followed by an alphabetical list of the others. On each copy, check the name of the person to whom the copy is being sent. For example:

cc: The Honorable Pete Wilson, Mayor
Councilman Larry Stirling
Board of Trustees
Chancellor Peed ✓
President Brooks
President Repashy

Note that this copy is being sent to Chancellor Peed.

Blind Carbon Copy Notation. There may be occasions when your boss will wish to send a "blind carbon copy" to someone. This means that the individual to whom the memo or letter is addressed

will be unaware that a copy of the letter is being sent to someone else. In these cases, make a photocopy of the original memo or letter. Take the copy of the memo or letter and type on it the designation "bc" below the Attachment or cc notation. For example:

JJ:lks

Enclosure

cc: Jim Smith

bc: John Martin (on copy of memo or letter only)

Postscripts. Type a postscript to a letter on the second line below all other notations, flush with the left margin, with or without the abbreviation "P.S."

Second and Subsequent Pages. Keep margins the same as those for the first page. Type at least two lines of a paragraph at the bottom of the first page and at least three lines on the second page. Never divide the last word on the first page of a two-page letter or report.

Proofreading. It is extremely important ALWAYS to proofread carefully and correct all errors before submitting the item to your boss for signature. Proofreading includes reading for sense as well as for typographical errors. Read everything you have typed -- from the date, name and address, down to the last initial on the bottom of the page.

MEMOS

There are several types of memos used by District Office staff and college/adult office staff. Samples 11-16, included here, will provide all the information you will need to prepare each type of memo according to the suggested District format. The samples include: 1) an Action Memo, 2) an Information Memo, 3) and alternate memo format, and 4) sample memos sent by a college office and an adult program.

DRAFTS

Sample 17 outlines the procedures for preparing drafts of letters, memos, reports or docket items. Drafts should always be double spaced, dated, and typed or stamped with the word "DRAFT."

SAMPLE LETTER--
BLOCK STYLE

The San Diego Community College District

3375 Camino del Rio South | San Diego, CA 92108 (714) 280-7610

ADULT AND CONTINUING EDUCATION | CITY COLLEGE | EDUCATIONAL CULTURAL COMPLEX | EVENING COLLEGE | MESA COLLEGE | MIRAMAR COLLEGE

Office of the Chancellor

January 1, 1980 (1)

CERTIFIED MAIL--RETURN RECEIPT REQUESTED (2)

ABC Company
1234 Fifth Avenue (3)
San Diego, CA 92101

ATTENTION: Mr. John Matthews (4)

Gentlemen: (5)

CONSULTANT STUDY (6)

This letter is typed in block format; i.e., all lines begin flush with the left margin. This is merely a sample letter showing the various types of notations that could appear on a letter. It is rare to find all of these notations on one letter.

Sincerely, (7)

Garland P. Peed

Garland P. Peed (8)
Chancellor

(1) Date
(2) Placement of certified mail notation.
(3) Inside address
(4) Attention line
(5) Salutation
(6) Subject
(7) Complimentary close
(8) Name and title
(9) Dictator's and typist's initials
(10) Enclosure
(11) Carbon copies
(12) Postscript

GPP:lks (9)

Enclosure (10)

cc: Sanders (11)

P.S. When it is necessary to add a postscript, type it two spaces below (12) the identification line or the last notation on the letter. GPP

SAMPLE LETTER--
MODIFIED BLOCK STYLE
WITH INDENTED
PARAGRAPH

**The San Diego
Community College District**

3375 Camino del Rio South | San Diego, CA 92108 (714) 280-7610

ADULT AND CONTINUING EDUCATION | CITY COLLEGE | EDUCATIONAL CULTURAL COMPLEX | EVENING COLLEGE | MESA COLLEGE | MIRAMAR COLLEGE

Office of the Chancellor

January 1, 1980

ABC Company
1234 Fifth Avenue
San Diego, CA 92101

Gentlemen:

CONSULTANT STUDY

This sample format is the modified block style, which means that paragraphs are indented and the date and complimentary close are placed a little to the right of center.

Sincerely,

Garland P. Peed

Garland P. Peed
Chancellor

GPP:lks

Enclosure

ABC Company
Page 2
January 1, 1980

Here is a sample of a second page of a letter. Begin typing the name of the addressee on the seventh line, followed by page number on the next and the date on the last line--all at the left margin in block style. Allow three spaces between the heading of the second and subsequent pages of letters and the beginning of the narrative.

Sincerely,

Garland P. Peed
Chancellor

GPP:lks

Enclosure

cc: John Doe

LETTER FORMAT - ALTERNATE
SECOND PAGE

ABC Company -2- January 1, 1980

Here is a sample of an alternate format for the second page of a letter. Begin typing the heading on the seventh line of the page. Allow three spaces before you begin the body of the narrative.

Sincerely,

Garland P. Peed
Chancellor

GPP:lks

Enclosure

cc: John Doe

XIII:07

(Sample 9)

BACKUP SHEET

Line 7: first line of typing

Use this backup sheet under letter, memo, or plain paper as a guide.

Center of page

Last line of typing

Variable margin lines

Variable margin lines

Center of page

Variable margin lines

Variable margin lines

Variable margin lines

Variable margin lines

The San Diego Community College District
RESOURCE CENTER FOR THE HANDICAPPED
3375 Camino del Rio South, San Diego, CA 92108 (714) 280-7610

(1) January 1, 1980

↕ Vary number of spaces here, depending upon length of memo.

(2) TO: John Smith

(3) RE: ACTION MEMO

↕ Always leave 3 spaces here.

(4) This is an "Action Memo" used by the staff at the District Office. As its name indicates, it is to be used whenever the sender is asking for action of any kind.

This particular format is preferred by many District administrators and their secretaries. However, an alternate format may be used and is shown later is this section as Sample 14 . Check with your boss to determine preference.

In this preferred format, the block style is used; i.e., all lines begin with the left margin. Placement of the memo on the page will vary depending upon the length of the memo. You can vary the amount of space between the date and the "TO:" line and the amount of space between the signature block and the typist's initials. For a short memo, leave several spaces between these areas; for lengthy memos, leave fewer spaces.

The main difference between this style and the alternate format shown later in this section is the signature block.

↕ Always leave 5 spaces here.

Beverly J. McKee

(5) Beverly J. McKee
Coordinator

↕ Vary number of spaces here, depending upon length of memo.

(6) BJM:caw

(7) Enclosure (or Attachment)

(8) cc: Enablers

(1) Date
(2) Name of person to whom memo is being sent
(3) Subject
(4) Body of memo
(5) Name/Title
(6) Dictator/typist's initials
(7) Enclosure/attachment
(8) Carbon copy notation

John Smith
Page 2
January 1, 1980

Here is a sample of a second page of a memo. Begin typing the name of the addressee on the seventh line, followed by page number on the next and the date on the last line--all at the left margin in block style. Allow three spaces between the heading of the second and subsequent pages of memos and the beginning of the narrative.

GPP:lks

Attachment

cc: Presidents
Directors

The San Diego Community College District

3375 Camino del Rio South San Diego, CA 92108 (714) 280-7610

Information MEMO

ADULT AND CONTINUING EDUCATION | CITY COLLEGE | EDUCATIONAL CULTURAL COMPLEX | EVENING COLLEGE | MESA COLLEGE | MIRAMAR COLLEGE

Office of the Chancellor

(1) January 1, 1980

Vary number of spaces here, depending upon length of memo.

(2) TO: Jean Smith

(3) RE: INFORMATION MEMO

Always leave 3 spaces

(4) This is an "Information Memo" used by the staff at District Headquarters. As its name indicates, it is to be used whenever the sender is providing information. If any type of action is required, then an "Action Memo" should be used instead.

Block style is used (i.e., all lines are flush with the left margin). Placement of the memo on the page will vary depending upon the length of the memo. You can vary the amount of space between the date and the "TO: ___" line and the amount of space between the signature block and the typist's initials. For a short memo, leave several spaces between these areas; for lengthy memos, leave fewer spaces.

Always leave 5 spaces

(5) Garland P. Peed
Chancellor

Vary number of spaces here, depending upon length of memo.

(6) GPP:lks

(7) Enclosure (or Attachment)

(8) cc: Directors

(1) Date
(2) Name of person to whom memo is being sent
(3) Subject
(4) Body of memo
(5) Name/title
(6) Dictator/typist's initials
(7) Enclosure/attachment
(8) Carbon copy notation

ALTERNATE MEMO FORMAT

DATE: Date memo is typed

TO: Name of person(s) to receive memo

FROM: Name of person sending memo

SUBJECT: CAPITALIZE SUBJECT OF MEMO

This memo can be an alternate format. The person originating this memo should initial the original where his/her name is listed above before the memo is duplicated and disseminated.

Block format is used (i.e., all lines begin flush with the left margin).

Originator's initials: typist's initials

Enclosure (or Attachment) notation

cc: List names of persons to receive copies of memo

THE SAN DIEGO COMMUNITY COLLEGE DISTRICT

San Diego Mesa College
7250 Mesa College Drive, San Diego, CA 92111 (714) 279-2300

October 5, 1979

To: Arnold
Burdg
McCommins

RE: MEETING ON FACULTY LOAD

I have set up a meeting with City and Miramar staff to discuss details of the CTA contract and faculty load. Please bring any support staff you feel would be important in the discussion.

Date: Wednesday, October 10

Time: 1:00 p.m.

Place: Mesa College
Room H-118

Allen Brooks
President

AB:ds

MEMO FORMAT

ADULT PROGRAM

Adult and Continuing Education

5350 University Ave., San Diego, CA 92105 (714) 280-7610, Ext. 141

Office of the President
Philip del Campo, Ph.D.

M E M O R A N D U M

Date: November 8, 1979

To: Greenford

From: Kemptner

Subject: ABE PROJECT ENROLLMENT AND ATTENDANCE REPORTS

In order for the San Diego Community College District to comply with California State Department of Education attendance reporting requirements, it is necessary that instructors of classes designated as part of the ABE Project follow all testing and reporting requirements of the Adult Education Field Services Section of the State Department of Education.

Please alert all ABE Project instructors that these procedures will be forthcoming and they must comply.

GS/jd

cc: Field

SAMPLE OF DRAFT FORMAT

DRAFT

When preparing a draft of a memo, letter, or report, you should include the following elements:

1. Double-space drafts.
2. Either indent five spaces or triple-space between paragraphs.
3. All drafts should be dated.
4. If a draft is being prepared for someone else's signature, the name of the person who prepared the draft should be listed.
5. The word "draft" should either be typed or stamped on the page.

Prepared for Garland Peed's signature
by John Doe of Vocational Education Department.

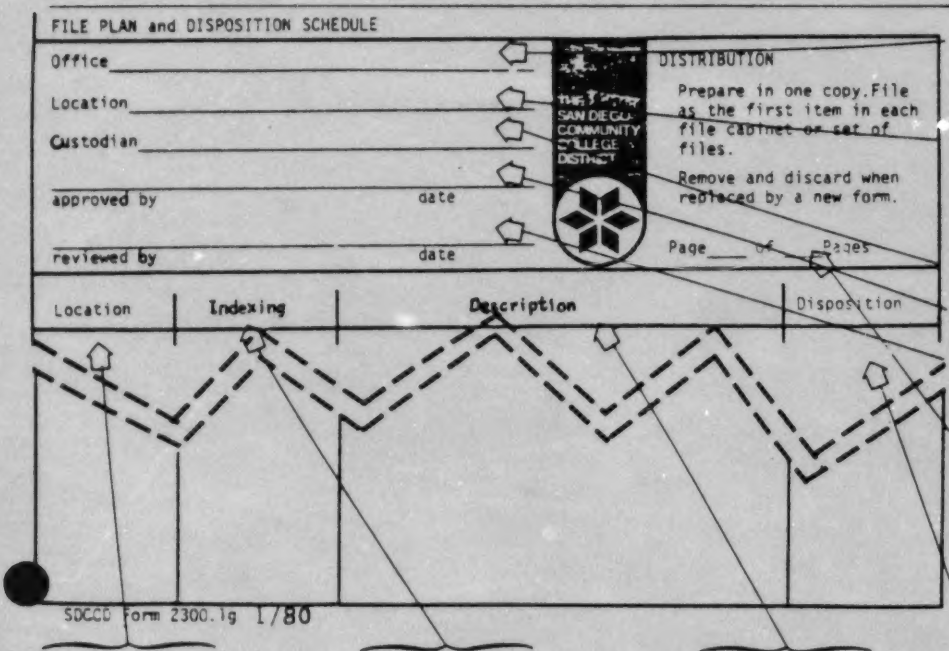
FILING

District procedures do not prescribe how your files are to be organized, but they do require that you develop a file plan which describes and manages the filing system which you have selected. The file plan should be prepared on Form 2300.1g, "File Plan and Disposition Schedule" (see Attachment D).

There are many acceptable and functional filing systems. Well-kept files and good records management are essential to successful office operations. Good records management means not only proper filing of records, but also their control, use, retrieval and disposition.

The information included in this section will help you to evaluate and improve your filing procedures.

File Plan and Disposition Schedule



Office Maintaining the file. e.g. Payrole, Chancellor, Policy/ Procedure, Security, etc.

Function & Office e.g. Personnel room 385, Admin.Serv.room 300, City college Business Mgr.room A-113

Name of person maintaining file

Chief of the office

Director, President Dean or Records Manager if assigned

Total pages in this plan

All file containers should be numbered. A typical entry is Cabinet #2 drawer#3 or This file, drawer #1, section #5

Show system of filing e.g. Alphabetic by addressee name, Numeric by calendar date, Alphanumeric by firm name and order number.

Describe the function of the file.e.g. General correspondence incoming and outgoing, Non-stock purchase requests, Project folders grants/contracts, Legal opinion files, Operating Employee files.

Indicate if the files contain SENSITIVE INFORMATION and access is restricted.

Should be based on the retention schedule approved in your SDCCD Form 2300.1f file.e.g. Current year office reference copies, Current year office of record file, Blank form stocks,

FOR FILES OF PAST YEAR RECORDS

Office of record first year Class 3 disposable, Office of record second year Class 3 disposable, Office of record class 1 Permanent first year (for subsequent past years see SDCCD Form 2300.1d, Record Transfer Log, file).

A "ONE-MINUTE" METHOD OF APPRAISING A FILING SYSTEM

1. Open a drawer or two and see how crowded they are.

2. Check the number of file guides in the drawer.

3. Critically examine the folders used in the file.

4. Critically examine file folder labels.

5. Note the amount of material filed in individual file folders.

"AN EASY FIVE-STEP METHOD OF EVALUATING A MANUAL FILING SYSTEM"

CHECKLIST QUESTIONS TO EVALUATE FILING OPERATIONS

Ask yourself the following questions:

1. Is the filing system proper for the function the records have?
2. Are the records given the required protection against fire, theft, and dampness?
3. Are records filed daily or more often if necessary?
4. Are useless materials being filed?
5. Are there many instances of misfiled or lost records?
6. Are there new developments in equipment or supplies that will improve operations?
7. Are file drawers overcrowded?
8. Is there an adequate number of guides for each drawer?
9. Is an individual folder prepared when five or more papers accumulate from one correspondence?
10. Is the number of papers in any standard folder limited to a maximum of 50?
11. When papers need fastening within a folder, are staples rather than paper clips used?
12. Do the file drawers, guides, and folders bear descriptive labels and captions?
13. Are standard indexing rules used?
14. Is there adequate cross-referencing?
15. Are the records sorted in the best way before storing?

FILING TIPS

1. Allow one-fifth of each file drawer for expansion.
2. Make a second folder for more than 50 pieces of paper. Identify these folders with beginning and ending dates.

3. Make one file guide for each major category or subject area.

4. Keep file drawers closed except when placing or removing material.

5. Type all captions in capital letters on labels.

6. Show cross-references in your file index.

7. Utilize an alphabetizer when you have a large quantity of filing.

8. Use color-coding for easy identification.

9. Replace removed folders with an outguide showing what the folder is and who has it.

10. Follow up on borrowed materials.

11. Replace raggedy, bulging folders with new ones.

12. Fold paper of unusual size so that writing is on the outside, not on the inside. This eliminates pulling each page apart.

13. Prepare items for filing by:

    a. Removing all paper clips, rubber bands and pins from papers.

    b. Repairing torn papers before filing.

    c. Pasting items smaller than 8-1/2" x 11" on standard size paper, time permitting.

14. Set aside a half-hour of each day for filing. Don't let filing pile up.

15. Get more mileage from folders by:

    a. Holding them firmly in the middle when removing them from a file drawer.

    b. Standing on end the folder behind the one being removed, for quick replacement later.

    c. Reusing old folders in good condition.

16. File immediately items your boss uses frequently.

17. File chronologically with the latest date on top.

18. Make sure that magazines, brochures, and other bulky items of a periodical nature do not crowd more important file material.

19. Stack narrow pamphlets and brochures in double or triple rows, lengthwise, within folders.

20. Equalize printed matter clipped or bound on one edge by alternating items within a folder with half of the bulky edges to the right and the other half to the left.

21. Eliminate duplications, such as carbon copies of correspondence, galleys, proofs, pasteups, reprints of published letters and reports, and identicial copies of published brochures.

22. Know the District's plan for review and retention of records (see District Procedure 2300.1).

23. Identify storage files by color-coding and appropriate subject and year identification.

24. Date folders with the school year.

25. Put frequently used files in most accessible drawers of file cabinets and less-used materials in another area.

26. The summer months are generally the best time to transfer and dispose of records from the active files. Transfer of material should be made at regular periods according to a prearranged schedule.

27. Use the same classification guides to divide records in the inactive files as in the active files. Mark the time span covered by the records on the front of the file. A list of folders in the front of the drawer is helpful.

28. Select tab positions that will give you file uniformity and easy identification of divisions and classifications.

29. Use rubber finger tips when working with papers, or put scotch tape on your fingers to avoid cutting them, and to assist in separating papers.

30. Bulletins, circulars and directives should be filed under the classification given to the subject matter.

31. File correspondence as follows:

    a. With the subject matter under discussion

    b. Under the name of the office or person writing or receiving correspondence

    c. In the proper association folder.

32. A sample of every form used should be kept with a notation as to where the reserve supply is stored.

33. Reports might be appropriately filed with the subject of the report, research, statistics, etc. If such material is varied, however, or covers too many subjects, set up a file under either the destination of the report or under the name of the office, person, or committee originating the report.

34 If your office is responsible for a great deal of reports and/or statistical information, try to set up separate classifications for "Reports and Statistics" with subheadings to meet the needs of your office.

LOCATION/RECOVERY TIPS

Even the best office employee can lose something at times. The following are some tips to speed up your recovery system:

1. For missing files:

    a. Check outguides first.

    b. Check the file drawer completely to see if the folder is out of place.

    c. Look under folders. It is possible for an entire folder to slip under other folders.

    d. Check with co-workers.

2. For missing correspondence:

    a. Check boss's desk and your own desk.

    b. Check to see if missing correspondence is not attached to something else.

c. Check if item was stuffed into a full desk drawer and fell to the drawer beneath it.

d. Review follow-up file.

e. Check items to be filed.

f. Check files carefully. Item may have been placed in a similarly referenced folder.

g. Check cross-reference index.

RECORDS DISPOSITION

In order to understand the challenge of record keeping, it is essential that you understand the distinction between "recorded information" and "records."

Recorded Information is an all-inclusive term referring to all the maps, books, paper, data base (electro-magnetic recordings), reports, correspondence used, created, or received in the conduct of District business.

Records are those pieces of recorded information which are classified as records during the year following their creation or receipt.

The key to managing this volume of paper is to have as a part of your written "file plan" automatic and systemized separation of records from recorded information at the time when your files are reviewed and established for a new year. If retention schedules are established for those "records" retained beyond the year of creation or receipt, disposition of the records will be effected without additional work.

FILING GLOSSARY

Active Files	The files in use now -- current files.
Alphabetic Filing	Filed according to the letters of the alphabet.
Alphabetizer	A device for arranging papers in complete sequence by bringing together all papers about one name, subject, etc.
Binder Folder	A folder which contains a metal fastener for holding papers.
Business Name	The official name of a company, a corporation, a partnership (firm), an organization, or an association.
Caption	The name or subject word or phrase under which the record is to be filed.
Coding	Underlining the portion or portions of a name or subject title that are used as the first index unit; the initial letter of the coded portion constitutes the letter of the alphabet under consideration.
Cross Referencing	The process of filing material in one folder that could very well be filed in two different folders, and then preparing a cross-reference sheet to be filed in the other folder, thus giving full information on where the actual material is to be found.
Cut	The width of a tab; a fifth-cut tab is one-fifth of the entire width of the guide or folder. It is possible to purchase tabs in many widths such as 1/7, 1/6, 1/5, 1/4, 1/3, 1/2, and full cuts.
Expansion Folder	A folder with additional folds at the bottom.
Filing	The systematic and orderly arrangement and storage of materials (cards, letters, invoices, statements, catalogs, blueprints, newspapers, and other office and personal records) for future reference.
Folder	A container made of heavy paper folded at the bottom for filing materials in the file drawers.

Full Name	The surname and at least one given name or initial of a person.
Geographic Filing	Filed according to the name of the place.
Guides	Cardboard or pressboard sheets--in a correspondence file--which divide a file into sections.
Inactive Files	File folders of the past year, or the past period, or files no longer consulted frequently.
Indexing	Mentally dividing names into index units for purposes of alphabetizing and then deciding the order in which the units are to be alphabetized.
Index Unit	Each position of a name that is used in indexing.
Labels	Gummed labels on which captions may be typed for affixing to the tabs.
Numeric Filing	Filing according to number.
Outguide	A control device to show that records have been removed from the file drawer.
Position	The spot at which the tab is placed along the width of the guide or folder; a guide may have its tab in as many positions as its cut allows.
Retention Schedule	The length of time material is to be kept.
Subject Filing	Filing according to the name of the subject that properly identifies the materials.
Tab	The extension of the guide, or the folder, with space for the writing of the caption.
Tickler	A file which serves as a daily reminder of matters that require attention.

SUGGESTED SUBJECT CLASSIFICATIONS

The following subject classifications were taken from "FILE IT RIGHT AND FIND IT," published by the National Association of Educational Secretaries for school/college use. This may or may not fit your individual office needs, but is included here to provide you with some suggested guidelines:

ACCREDITATION & EVALUATION
(hospitals & schools)

- Accredited schools or hospitals
- Agencies for accreditation
- Reports & applications

ADMINISTRATION (any organization)

- Administrative bureaus or departments
- Administrative staff Meetings & members
- County or state boards
- Policies and procedures
- Surveys & questionnaires
- Boards of Directors
  - Committees
  - Meetings
  - Members
- Organizational plans
- State departments
- U.S. departments

ASSOCIATIONS & ORGANIZATIONS

- Business & industrial
- Charitable & welfare
- Civic
- Employees
- International
- Parents
- Patriotic
- Professional
- Religious
- Social
- Youth

AWARDS, GIFTS, HONORS

- Employees
- Organizational

BANKING SERVICES

- Checking accounts
- Loan accounts
- New accounts
- Savings accounts
- Special services
- Trust accounts

BOOKS & PUBLICATIONS

- Articles
- Bibliographies
- Books, library, other
- Bulletins, brochures
- Journals
- Catalogs
- Clippings
- Magazines
- Newspapers

BUILDINGS & GROUNDS

- Custodial service
- Keys and locks
- Maintenance/operation
- Safety
- Use of buildings/grounds
- Utilities

BUSINESS & FINANCE

- Accounts receivable
- Accounts payable
- Equipment & supplies
- Government finance
- Insurance
- Legal matters & opinions
- Purchases & requisitions

CALENDARS & SCHEDULES

- Programs
- Business activities
- Classes & workshops

COMMITTEES & COUNCILS

- Employee
- Organizational
- Outside

CUSTOMER RELATIONS & SERVICES

- Retail sales
- In-house sales
- Departments
- Mail order sales
- Wholesales

DIRECTORIES

- As needed

FOOD SERVICES

- Cafeteria
- Diets
- Staff

FORMS

- Organizational
- Others

GOVERNMENT (Federal state, county & local)

- Civil defense
- Civil service
- Laws & legislation
- Military

INSTRUCTION & IN-SERVICE TRAINING

- Apprentice training
- Audio-visual
- Course approval
- Instruction divisions
- Meetings
- Staff personnel & programs

PATIENT RELATIONS & SERVICES

- Admissions
- Aid
- Cardiopulmonary
- Critical/intensive care
- Counseling
- Emergency
- Drug & alcoholism
- Pediatrics
- Geriatrics
- Medication
- Medical staff
- Outpatients
- Quality control/laboratories
- Physical therapy
- Psychiatric

PERSONAL

- Correspondence
- Engagements
- Speeches

PERSONNEL

- Absences
- Affirmative action
- Appointments
- Certification/licenses
- Civil service
- Contracts
- Equal employment
- Examinations & tests
- Industrial health
- Merit system
- Policies & procedures
- Salary schedules
- Services
- Substitutes

PUBLIC RELATIONS

- Community contacts
- Complaints/compliments
- Speakers bureau
- Mail
- News releases

SCHOOLS & INSTITUTIONS

- Correspondence
- Local
- State

SPECIAL SERVICES

- Community resources
- Counseling
- Health
- Libraries
- Religious education

STUDENTS

- Accidents
- Activities
- Admissions
- Alumni
- Athletics
- Attendance
- Awards & scholarships
- Counseling
- Employment
- Placement
- Regulations
- Schedules
- Scholastic progress
- Testing
- Transfer & withdrawal

TRANSPORTATION, TRAVEL & TRIPS

As needed

MEETINGS AND MINUTES

Don't panic because you have been asked to take minutes. Instead, take a positive attitude. Attendance at the meeting will provide you with an excellent opportunity to learn what is going on in your particular department, college or center. You can learn how policy is determined, how decisions are reached, and how different people think. Taking minutes can actually be a fascinating experience.

MINUTES: A DEFINITION

Webster's New Collegiate Dictionary defines minutes as "the official record of the proceedings of a meeting." Minutes can be formal (such as those taken at a meeting of the Board of Trustees); they can be a record of actions taken or decisions reached; they can be a summary of a discussion in which no decisions are made; or they can be a combination of any of the above. However, most office conferences are informal discussions where opinions are exchanged, conclusions are reached, and recommendations are made with no observance of protocol.

The decision as to the type of minutes to be taken and how detailed those minutes should be is something only the chairperson of the committee will be able to tell you. Check with the chairperson ahead of time to determine his/her preference. Also, review some of the minutes of previous meetings to clarify in your own mind the type of approach you will take. Samples 18 - 21 at the end of this section provide you with various formats that may assist you in deciding how to take and prepare your minutes.

The following are suggested procedures to be followed before, during and after your meeting.

BEFORE THE MEETING

1. **Schedule the meeting, arrange for the meeting place, and arrange for audiovisual equipment.** You may find Attachment E, "Checklist When Planning a Meeting," to be a helpful review of your planning process.

2. **Prepare the agenda.** Talk to the chairperson of the meeting and obtain a list of the topics to be covered. Sometimes committee members will ask you to place an item on the agenda. Once you have this information, prepare an agenda and duplicate enough copies in addition to any backup materials to be reviewed during the meeting. Sample 22 at the end of this section provides an example of an agenda format.

   Some chairpersons prefer to have the agenda and backup material mailed out prior to the meeting. Other chairpersons prefer to distribute the agenda and materials at the meeting. Determine the preference ahead of time.

3. **Prepare a folder for the meeting.** Label a folder with the name of the committee and date of the meeting as soon as it has been scheduled. Include the following items in the folder:

   a. List of committee members

   b. Copy of agenda and backup materials for yourself

   c. Copy of the previous set of minutes

4. **Familiarize yourself with the materials.** In order to make your minutes-taking easier, you should read the previous minutes as well as the current agenda and backup materials. The more you know about what has happened in previous meetings and what is scheduled to be discussed in this meeting, the easier it will be to take notes and transcribe them accurately.

DURING THE MEETING

1. **Arrive early.** Arrive a few minutes before the meeting is schedule to begin. If the agenda and backup materials were not sent out ahead of time, put a copy of the materials at each place at the conference table. Be sure that you have a shorthand notebook, two or three pens or pencils, and the meeting folder you set up earlier.

ATTACHMENT E

CHECKLIST WHEN PLANNING A MEETING

FOLDER

_____ Prepare manila folder.

_____ Include committee roster and other pertinent material.

TELEPHONE

_____ Telephone secretaries for various meeting time possibilities.

_____ Telephone secretaries to release calendar times held when meeting time determined.

_____ Arrange for office telephone coverage for day of meeting.

ROOM

_____ Check with chairperson to determine room preference.

_____ Reserve room at District Office or college/site.

_____ Check room prior to meeting time for proper environment and equipment.

_____ Place name cards at tables, if necessary.

VERIFICATION OF MEETING

_____ Type either a written verification of meeting (note-o-gram or memo) or prepare an agenda.

_____ Hand deliver notice, if possible, if meeting is next day.

_____ Duplicate, if necessary, verification of meeting.

_____ Mail verification of meeting or agenda.

EQUIPMENT

_____ Reserve audiovisual equipment, if needed.

_____ Notify building custodian of request for equipment.

_____ Place note on calendar.

_____ Check room on day of meeting to see that equipment is there.

CALENDAR

_____ Record meeting on all office calendars as soon as possible.

(Taken from San Diego City Schools Office Manual, 1976)

2. **Check the meeting room.** Make sure that chalk, erasers, ashtrays, and any requested audiovisual equipment are in place.

3. **Sit next to the chairperson.** This position will enable the chairperson to alert you to various items he/she feels are important to include in the minutes, and will allow you to ask for clarification.

4. **Listen carefully.** Concentrate on what is being said, so that you can accurately record what the speaker is saying. Minutes should be a complete outline of a business meeting. Therefore, write down the main points of discussion, but record verbatim the motions, resolutions, decisions, or other official statements. Be sure to show the name of the person making the motion, the motion itself and the name of the seconder, the decision, and any assignment(s) made.

5. **Plan your note-taking strategy.** You may wish to write only on the left side of the shorthand notebook for general discussion and/or verbatim recording. Use the right side for assignments, motions, or action items, etc. This method will save you the time of reading through all of your notes if your boss wants to refer to any assignments, decisions, etc., before your notes are typed.

6. **Obtain a copy of all materials.** If materials are distributed by members of the group, be sure that you receive a copy. You will need to refer to these items when preparing your minutes. Remember, you should have a copy of all items reviewed and discussed or distributed at the meeting to insure that your records of the meeting are complete.

AFTER THE MEETING

1. **Check your notebook for items that require immediate action.**

2. **Make a rough draft of your minutes.** Do this immediately while the sequence of events is still fresh in your mind. Reread your shorthand notes for each item, and then put the ideas into your own words.

   Transcribing can be like piecing together a jigsaw puzzle, since discussion may not always follow the sequence of items as shown on the agenda. There are times when discussion will begin on one topic, shift to something else, and then return to the original topic much later in the meeting. In addition, there are times when the group will explore several alternative solutions to a problem before reaching a decision.

Because you do not know at the time which alternative the group will finally select, it is necessary to take notes on the entire discussion. There will also be instances when the group will discuss items that are confidential and should not be included in published minutes. In short, it will be your job to (1) weed out any irrelevant or confidential information; and (2) include only pertinent information, main points of discussion, decisions reached, and assignments made.

Don't be afraid to ask your boss for clarification, if necessary.

3. **Be concise.** Make your minutes sound professional by avoiding wordiness.

4. **Use the impersonal narrative.** In other words, when you are transcribing your minutes, avoid using "we decided" or referring to a committee member by first name.

   Avoid: We decided that the best course of action . .

   Use: It was decided that the best course of action . .

   Avoid: Tom was assigned the task of . .

   Use: Mr. Jennings was assigned the task of . .

5. **Make your minutes interesting.** Use different verbs, such as:

   Mr. Smith announced. . .
   Mr. Smith pointed out. . .
   Mr. Jones voiced concern. . .
   Mr. Jones indicated. . .
   It was emphasized that. . .
   Ms. Martin summarized. . .

   Add some of your own action verbs. Be creative.

6. **Prepare a draft of the minutes.** Submit the draft for your boss to review. Refer to the Correspondence section of this manual for a proper draft format.

7. **Keep a list of all pending assignments.**

8. **Prepare the final copy.** After the chairperson has approved the draft of your minutes, type them in final, obtain the chairperson's signature in the approval section, duplicate and distribute the minutes.

SAN DIEGO COMMUNITY COLLEGE DISTRICT
(Name of office/department
college or center)

NAME OF COMMITTEE

The first meeting (or the tenth and final meeting) for the 19__-__ college year was held in (place of meeting) at (time of day). (name of chairperson) presided.

Members present: (Always list the names of those present)
Members absent: (The names of those absent may be included or omitted at the discretion of the chairperson)

APPROVAL OF MINUTES

The minutes of the meeting of _____ were approved as written. (Indicate here whether any corrections were made to those minutes.)

GENERAL CRITERIA FOR BODY OF MINUTES

1. Items discussed. Use margin captions. The captions should be capitalized and placed in the left margin. Record each different action in a separate paragraph.

2. Record main discussion points, assignments made, actions taken, decisions reached. Highlight in some way the assignments made.

   EXAMPLE:

   ASSIGNMENT: Mr. Smith was asked to analyze the data and provide a report at the next meeting.

NEXT MEETING

Show as the last item the date, time, and place of the next meeting (or indicate that it is to be on call of the chairman). If your committee meets on a weekly basis at the same time, it is not necessary to add this section.

(signature)
(Name of secretary and title)

APPROVED (signature)
(Name of chairperson and title)

If more than one page is used, place identification at the upper left of each following page:

Page____
Name of Committee
Date of meeting

Minutes of Presidents Cabinet

San Diego
Community College District
3375 Camino del Rio South San Diego, CA 92108 (714) 280-7610

Office of the Chancellor

Assignment No.	Description

Assignment No.	Description

ALTERNATE SAMPLE FORMAT FOR MINUTES

Description of Agenda Item	Presented by	Action/Assignment/Comments

(Sample 21)

SAN DIEGO COMMUNITY COLLEGE DISTRICT
(Name of office/department
college or center)

NAME OF COMMITTEE

AGENDA

(Date of meeting)
(Time of meeting)
(Meeting place)

You may list agenda items either by subject or by the name of the individual presenting the item. See examples listed below:

SAMPLE OF SUBJECT AGENDA

1. VEA budget. . . . . Hamann
2. Mesa College art addition. . . . . Brooks
3. Police and Sheriff's Academies. . . . . Yee

SAMPLE OF AGENDA ITEMS LISTED BY NAME OF INDIVIDUAL

1.0 Hamann

*1.1 Diesel and Heavy Equipment Program
1.2 Employability Enhancement Center

2.0 Leonard

**2.1 Update on budget development process

3.0 Ramstad

***3.1 Personnel Manual
3.2 Personnel/payroll system

(initials of chairperson and typist)

*Materials distributed with agenda
**Materials distributed previously
***Materials to be distributed at meeting

REPORTS

Follow the rules below when you are preparing a report. Please refer to the sample page of a report (Sample 23) at the end of this section.

Title Page

1. The first page is the title page. It should be centered in the middle or upper middle of the page.

2. Other identifying information on a title page usually includes the following: author, date and publisher.

Margins

1. The left margin should be one inch. If the report is to be bound or punched on the left, one and one-half inches should be allowed -- one inch for the margin and one-half inch for binding or punching. (Note: there are 12 elite spaces and 10 pica spaces to one inch.)

2. The right margin is one inch.

3. The top margin of the first page should be 12 lines. Typing begins on the 13th line. The margin for each subsequent page is six lines, with typing beginning on the seventh line.

4. The bottom margin is one inch. (Note: there are six lines to one inch.)

Page Numbers

1. Number the table of contents and other pages preceding the narrative with small Roman numerals. For example: i, ii, iii, iv, v.

2. A number does not appear on the first report page, although it is assigned the number 1.

3. Number all other pages consecutively, beginning with the number 2, including the appendix. A number may appear in the upper right corner or centered at the bottom of the page.

Placement

1. Reports may be single or double spaced. If double spaced, indent five spaces at each paragraph or use triple spacing between paragraphs.

2. Long quotations should be indented at least five spaces in from left and right margins. This also applies to tables and lists.

Headings and Subheadings

1. Beginning on the second page, there is a special heading on line 7, centered, at the top of each page.

2. A report is often divided into chapters or sections. Each chapter has a heading which is usually underlined and has a triple space above it and a double space below.

3. If the heading is more than 2-1/2 inches long, type it in two or three lines, single spaced, with the longest lines of typing on the first and/or second lines.

4. When the chapter or section is divided, a minor subheading is often used. It is usually typed two lines below the preceding narrative. It may be either on the same line (followed by a period) or two lines below.

Outline Styles

1. A uniform outline style should be followed throughout the report. The decimal system of subdividing report topics is the more formal format:

1. The first subdivision at this level . . .

1.1 The next subdivision at this level . . .

1.11 The next subdivision at this level . . .

1.111 The next subdivision at this level . . .

1.112 The second point in this subdivision . . .

1.12 The second point in this subdivision . . .

1.2 The second point in this subdivision . . .

2. The following is the more traditional outline listing of alternate numbers and letters:

    1. The first subdivision at this level . . .

        a. The next subdivision at this level . . .

            1) The next subdivision at this level . . .

                a) The next subdivision . . .

                b) The next subdivision . . .

                    (1) The first point in this subdivision . . .

                    (2) The second point in this subdivision . . .

3. A variation of either outline style is possible. The chosen style should be easy to read and should be used consistently throughout the report.

(sample page of a report)

From page 2 onward, typing begins on line 7, one inch from top.

PAGE 1 BEGINS ON LINE 13 WITH THE TITLE
CENTERED IN ALL CAPITAL LETTERS

The first paragraph begins 3 lines below the title.

1" margin

1" margin

HEADING

1 1/2" margin

A section heading, if any, is 3 lines below preceding narrative. The first paragraph after a heading begins 2 lines below the heading.

Subheading. A subheading is 2 lines below preceding narrative. It may be followed by sentences beginning on the same line or 2 lines below.

Center of page for 1" margin

Center of page for 1 1/2" margin

Typing ends 1" from bottom

CALENDARS AND SCHEDULES

No one can remember every detail or appointment without making a notation of the information. Calendars and tickler files are the basis of any reminder system.

Maintaining your boss's calendar is one of the most important duties of a secretary. Often this responsibility requires coordinating two or even three calendars (the secretary's desk calendar, the boss's desk calendar, and the boss's pocket calendar), plus a tickler file. In this case the trick is to keep all of the calendars coordinated so that both you and your boss know where he/she should be at any given time. In other cases, a single calendar kept on the secretary's desk may be the boss's preference.

CHOOSING YOUR CALENDAR

The secretary's calendar. A desk calendar with half-hour divisions is one possibility. It puts the day's activities directly in front of the secretary. It also, however, places the boss's schedule in view of the casual observer. Therefore, an appointment book which shows a week at a time and has the half-hour divisions may be a better choice. (See Sample 24.)

The boss's desk calendar. Your boss's preference is the primary consideration in selecting his/her desk calendar. (See Sample 25 for one alternative.)

The boss's pocket calendar. This portable counterpart of the desk calendar lets the boss make appointments when he/she is away from the office. It also reminds him/her of the day's appointments. (See Sample 26.)

Conflicting appointments may be made inadvertently, and firm commitments should not be made unless all calendars are available to the secretary. Note phone numbers in case of a need to change an appointment.

MAINTAINING THE CALENDAR

Recurring matters. Make a list of those events which must be remembered. Some suggestions are:

Board of Trustees meetings
Committee meetings
Staff meetings
Conferences, conventions and annual meetings
Business association or service club meetings
Legal and declared holidays

Important personal dates. Note special dates such as vacations, wedding anniversaries, and family birthdays.

Calendar Upkeep:

1. When an appointment is made, enter it on all calendars as soon as possible. Make a notation to enter it on any calendars not available to you at the time, such as the boss's pocket calendar or desk calendar if he/she is out of the office or in conference.

2. When entering an item such as a report to be made or an application for funds to be filed, include additional reminders well in advance of the actual deadline date.

3. Pay attention to incoming and outgoing correspondence, and note any commitments.

4. Check your boss's calendar each day to see if he/she has made an appointment and forgotten to tell you.

5. If dates for certain matters have not been established, make a note to yourself to keep checking.

THE TICKLER FILE

A tickler file is simply a follow-up file. It is not a substitute for your calendar(s) where appointments are concerned. The tickler may be a 3 x 5 card file; it may be an expanding file made especially for the purpose; or it may be a set of folders in a file drawer. It consists of a tabbed guide for each month of the year and tabbed guides numbered 1 through 31. Memoranda are placed in the file behind the daily guide according to the date on which the matter is to be brought up.

There is no limit to the kinds of things you can put in your tickler file to jog your memory. Here are some suggestions:

Situations referred to your boss's colleagues or an outside source for information or comments.

Correspondence you or your boss must answer.

Correspondence you or your boss have sent requesting information or specific action, or promising the same.

Future delivery dates on orders.

Administrative issues that periodically come up for consideration.

Reminders of recurring tasks such as renewal of memberships.

The Tickler: A Card Index

Notations are made on 3 x 5 cards and should include all the information necessary for taking action on a certain item. For

example, if your boss has requested a report from an individual by a certain date, the tickler card would indicate the date due, the subject matter, the individual's name and where the material regarding the matter may be found. When you have an event that occurs more than once during the year, make out one card and move it up from month to month.

The Tickler: A Follow-up File

File folders are arranged so that the current month is at the front of the drawer with the eleven succeeding months behind it. Immediately behind the current monthly folder, put the daily 1 through 31 tabbed folders.

Originals of items that need to be followed up are placed in the regular file. For the follow-up reminder place in the tickler file either a copy of the original or a brief memo stating where it is filed and what has to be done with it. Sometimes it saves time to make an extra copy of the material for the follow-up file.

THE APPOINTMENT BOOK

6 Week Beginning April

April 1981

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

96 Monday 6 269

8 1

9 2

10 3

11 4

12 5

Evening

97 Tuesday 7 268

8 1

9 2

10 3

11 4

12 5

Evening

98 Wednesday 8 267

8 1

9 2

10 3

11 4

12 5

Evening

Week Ending April 12

May 1981

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

99 Thursday 9 266

8 1

9 2

10 3

11 4

12 5

Evening

100 Friday 10 265

8 1

9 2

10 3

11 4

12 5

Evening

101 Saturday 11 264

A.M.

P.M.

Evening

102 Sunday 12 263

Palm Sunday

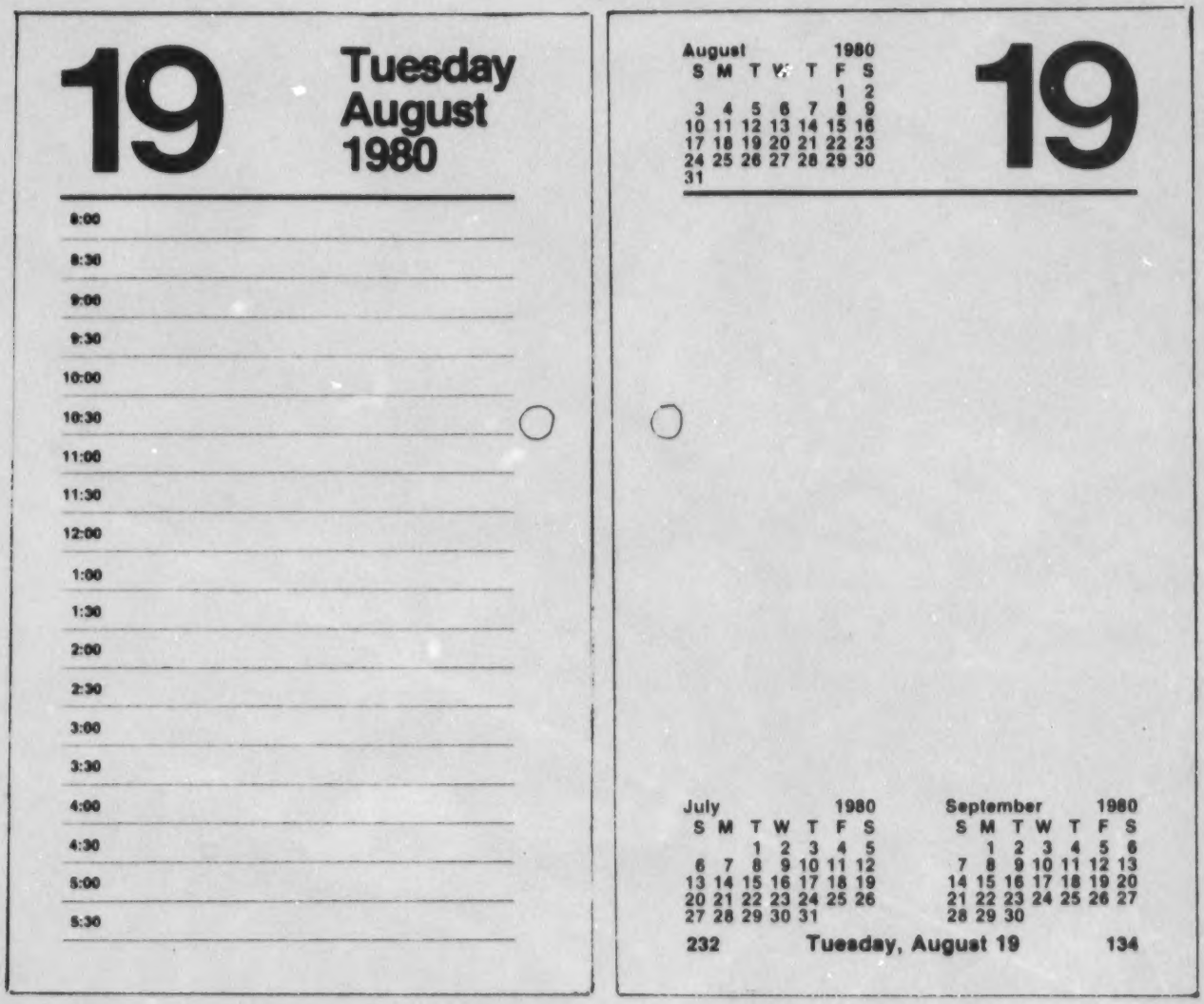
A.M.

P.M.

Evening

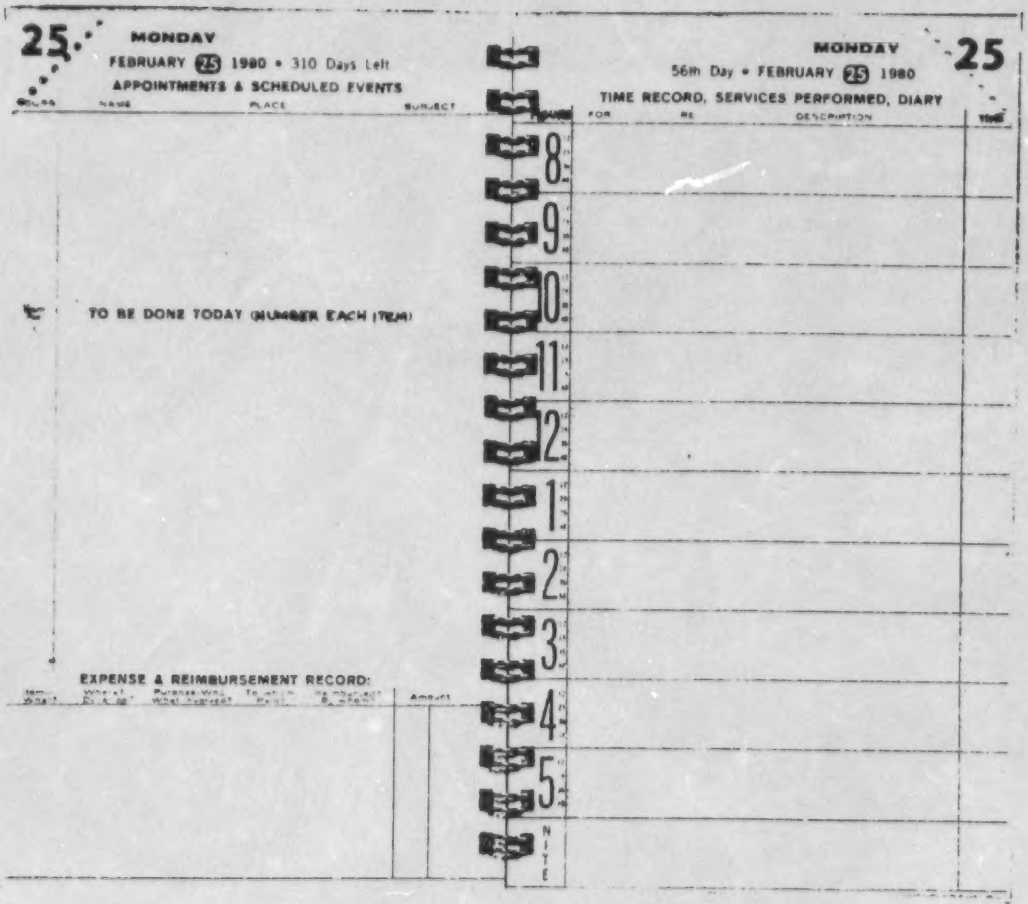
(Sample 24)

The Desk Calendar



XVII:06 (Sample 25)

The Pocket Calendar



MAIL

In your schedule, allow time for prompt attention to mail, both incoming and outgoing. The goal you should keep in mind is to process all mail in a way that your boss can read, answer, and dispose of quickly and thoroughly.

In most District offices, it is important to coordinate handling of the mail with the operations of the staff in the campus/site mailroom. Know the schedule and pickup times that have been established. Know also what to do when mail must go out at times other than those scheduled for pickup. Know the hours when you must have materials in the mail if they are to be sent within a specified time.

PROCESSING INCOMING MAIL

1. Develop a system for handling incoming mail. Set up appropriate folders for each major category for your boss's desk. Some suggestions are:

   a. Action Items (or "Attention")
   b. Please Sign
   c. Information Only
   d. Leisure Time Reading

2. Stack envelopes and fan them while scanning to ensure items are addressed to the appropriate person or office. Remove from the stack any marked PERSONAL or CONFIDENTIAL, and place them in the appropriate folder.

3. Open all envelopes. As you empty the envelopes, make sure that everything has been removed.

4. Some offices require that each envelope be stapled to the letter that was enclosed. In any case, attach the envelope if there is no return address on the letter.

5. Date-stamp each piece of mail.

6. Indicate on the face of a letter if the enclosure is missing; make a reminder to yourself on your desk calendar to write a letter of inquiry if the enclosure does not come in a day or two.

7. Underline or highlight subjects and certain action phrases, such as "send us," "reply by," "for your information," "let us know," or "for immediate reply." Make marginal notes about items that have been acted on or referred to others.

8. Attach any previous correspondence that will shed light on the incoming letter or will save time by providing information that may be needed in replying.

9. Prepare replies to routine correspondence for signature or draft reply for approval or revision and attach to incoming correspondence (depending upon whether your boss has given you this responsibility). Prepare a collection of sample letters to assist you in answering routine correspondence.

10. Find out what mail of a general nature your boss wants to see. Some prefer that their secretaries screen their mail and immediately route whatever does not concern them or what they themselves would route to other staff. Staple routing slip (most offices have them) to corner of correspondence and either give it to your boss or start the routing process yourself depending upon his/her preference. If your boss is out of the office for more than a few days, rather than hold a routed item, simply forward it to the next person.

11. The final step in preparing mail for presentation is to arrange it in the preferred sequence before placing it in the folders.

12. Ask your boss for personal preference in handling incoming and outgoing mail during absences.

PROCESSING OUTGOING MAIL

District campuses/sites have large mailing departments that handle most of the work of sending out the mail. However, there are many duties that you must perform before the mail is ready to go to the mailroom. Also, be prepared to send out your mail after the mailroom has closed for the day.

1. As soon as typed material is taken from your typewriter, address the envelope, place the envelope flap over the original letter and any enclosures before giving to the boss for signature. Type envelopes for persons receiving copies.

2. For enclosures:

   a. The same size as the letter--Do not staple to letter (enclosures of this size consisting of two or more pages are stapled together--don't use paper clips). Fold enclosure the same as letter and slip inside the last fold of the letter.

   b. Smaller than the letter--Staple enclosure to upper left corner of letter. If there is more than one of these enclosures, place the smaller one on top of the larger.

   c. Larger than the letter--Place it and the letter in a large manila envelope to go first class if desired (or it will go third class).

   d. Different sizes--Fold according to size of envelope being used.

3. Fold letters so when removed from the envelope and unfolded they will be in normal reading position.

4. Ask yourself the following questions before placing a letter in the envelope:

   a. Has the letter been signed?

   b. Have I made all required copies, including the file copy?

   c. Are all enclosures included?

   d. Are the inside and envelope addresses the same?

5. Be sure you include the Zip Code on all outgoing U.S. mail envelopes.

6. Before the U.S. mail leaves your office, separate the mail that has a stamp from that which is to be metered. Also, regarding metered mail:

   a. Band together, unsealed, with envelope flaps in the open position (the mail meter will seal).

b. The postage meter is not to be utilized for personal mail.

c. Each bundle of mail (or individual envelope) must be accompanied by a budget charge slip with the name and department and the current year's budget number (these forms are available in the mailroom).

7. On special large quantities or bulk mailing, separate by Zip Code groups. Notify the mailroom in advance of a large mailing (preferably three days in advance).

8. Do not attempt to sort mail in the mailroom.

9. On certified mail, a Post Office Receipt Form (PS 3800) must be completed and accompany the letter to be certified. This form and return receipt are available in the mailroom.

10. Mark packages First Class, Third Class, Printed Material, etc.

11. Is there a new employee in your office? Has an employee moved to another office/campus/site? Please notify the mail clerk so the records can be kept up to date.

12. You are invited to consult with the mail clerk on any special mailings. He/she is knowledgeable of current postal regulations and can frequently make suggestions that result in lower mailing costs.

MAIL DELIVERY SCHEDULE

Insert your campus/site mail schedule (both U.S. and school mail) in this section. Keep it up to date.

INSERT YOUR CAMPUS/SITE

MAIL SCHEDULE HERE

SUPPLIES AND EQUIPMENT

DISTINGUISHING BETWEEN SUPPLIES AND EQUIPMENT

Distinguishing between supplies and equipment is frequently difficult. However, the District must correctly identify each expenditure to maintain necessary accounting uniformity. The criteria for making these distinctions are outlined in the "Budget and Accounting Manual, California Community Colleges," revised December 1978. These criteria are used by all California community colleges.

Supplies. Supplies are expendable. They will be consumed or worn out, deteriorate with use, or be easily broken, damaged, or lost. Examples: paper, pencils, nails, cleaning materials, scissors, test tubes, thumbtacks and keys.

Items with a relatively short service life and which are replaced frequently are also charged as supplies. Examples: brooms, chamois and rubber stamps.

Equipment. In contrast with supplies, equipment has permanent value and its purchase increases the value of District physical property. Examples: furniture, machines, musical instruments and vehicles.

Identification. To identify an item as supply or equipment, ask yourself the following questions:

1. Does the item lose its original shape and appearance with use?
2. Is it consumable, with a normal service life of less than two years?
3. Is it easily broken, damaged, or lost in normal use?

4. Is it usually more feasible to replace it with a new unit than repair it?

5. Is it expensive, having the characteristics of equipment? Does the small unit cost make it inadvisable to repair?

If the answer to any one of these five questions is "yes," the item should be classified as **SUPPLY**. If all answers are "no," the item should be classified as **EQUIPMENT**. When in doubt, contact the Purchasing Office or General Services, District Warehouse.

OFFICE SUPPLY INVENTORY

It is important to perform a thorough weekly check of your office supply inventory so that you don't run out of an item just when you most need it. Refrain from ordering small quantities each week. Try to anticipate the rate of depletion of most-used items and take into account upcoming rush periods or projects you know will require certain supply items.

Fill your own desk area needs and those of your co-workers before putting everything away. Arrange supplies in an orderly manner for easy access. Designate a place for each item and mark the shelf accordingly. Don't overstuff a cabinet as this causes a waste of time and a waste of materials. You may have plenty of a particular item on hand but not be able to see it in the cabinet.

Arrange the supply cabinet using these suggestions from the Bureau of Business Practice:

1. Separate the various kinds of paper, memos and envelopes with wooden or metal shelf dividers.

2. Use separate boxes with lids to store multiple items such as paper clips, staples, rubber bands, erasers, pencils, pens.

3. Vertically shelve all bound reports and manuals.

4. Label everything: each shelf compartment, box and manual binding.

The following suggestions relate to supply inventory control:

1. Begin an index system located near or in the supply cabinet and indicate what is stored there and elsewhere. Note the maximum quantity you feel practical for each item and the minimum quantity for ordering. Allow space for indicating items to be ordered and the date of last ordering, and give an estimate of a normal time lapse from order to delivery. This way, you can survey your supply inventory at a glance.

2. Type small labels for each stock item and attach them to supply shelves. Whenever a new order for supplies arrives, shelve it as soon as possible and add to the sticker the number received and the date. This also helps in planning stock and nonstock ordering.

3. Place a sheet of paper on or near the cabinet with a pencil hanging near it. Indicate to co-workers that when they take the last of an item, they should write it down on this sheet for reordering purposes. They can also indicate other items they need on this list and you can use it as a guide when placing orders, particularly out of the Stock Catalog.

STOCK REQUISITIONS

Items ordered from the Stock Catalog are used most frequently by sites and departments. They are purchased and stored in the San Diego Unified School District warehouse for later use by the Unified and Community College District offices. To check if the item you need is carried in the warehouse (after you have checked your Stock Catalog), call Unified Materiel Control, 279-7431. Please refer to Sample 27 at the end of this section for a copy of a Stock Requisition form.

Telephone Orders

You may place orders by telephone by calling: 279-7434. All items listed in the catalog, except Class 41 items (Curriculum Publications), may be ordered by telephone. To order the Curriculum Publications, which are a charge item to the Community College District, use a Nonstock Requisition and send it through normal channels.

When ordering by telephone, you should use the International Communications Code Alphabet. Please refer to Attachment F on the following page. Even when you telephone the order, you must still complete a Stock Requisition. You will be asked to give a Stock Requisition number, your budget number, and the delivery location number before giving the stock numbers for the items you are ordering.

Procedures

If the order is telephoned, retain the original copy of the Stock Requisition for office monitoring and send the green copy to the individual who receives deliveries from the Unified warehouse and distributes to the offices within your building or site.

The pink "advice" copy should be received by the ordering office within ten working days. This indicates that the order is being processed.

The yellow "stores invoice" will accompany the items when delivered. Check this delivery copy against the items received to verify that the order is correctly filled.

ATTACHMENT F

THE EFFICIENCY OF OUR MECHANIZED TELEPHONE ORDERING SYSTEM IS DIRECTLY TIED TO THE ACCURACY OF THE INFORMATION AS RECORDED BY OUR TELEPHONE ORDER DESK. PARTICULAR DIFFICULTY HAS BEEN EXPERIENCED IN THE TRANSMISSION AND RECORDING OF THE LETTER PORTION OF THE STOCK NUMBER. MANY OF THE WORDS USED TO ILLUSTRATE THIS LETTER PORTION ON THE STOCK NUMBER END UP SOUNDING ALIKE.

TOY AS BOY
TOM AS PROM
PAM AS SAM
BOX AS FOX, ETC.

TO PRECLUDE THIS DIFFICULTY, IT IS SUGGESTED THAT THE INTERNATIONAL COMMUNICATIONS CODE ALPHABET BE UTILIZED AS FOLLOWS:

17-B-0220 WOULD BE CALLED AS 17 BRAVO 0220

OR

17-C-0625 WOULD BE CALLED AS 17 CHARLIE 0625

A.	ALPHA	J.	JULIET	S.	SIERRA
B.	BRAVO	K.	KILO	T.	TANGO
C.	CHARLIE	L.	LIMA	U.	UNIFORM
D.	DELTA	M.	MIKE	V.	VICTOR
E.	ECHO	N.	NOVEMBER	W.	WHISKEY
F.	FOXTROT	O.	OSCAR	X.	X-RAY
G.	GOLF	P.	PAPA	Y.	YANKEE
H.	HOTEL	Q.	QUEBEC	Z.	ZULU
I.	INDIA	R.	ROMEO		

PROCEDURE 7013-1. D2 (2).

If the order is not telephoned, send the original Stock Requisition to the Unified District Materiel Control and Warehousing Department via school mail; retain a copy for yourself and send a copy to the individual who receives deliveries from the Unified warehouse and distributes to the offices within your building or site.

Credit

When an error has been made in placing an order, or by the Materiel Control Office in filling an order, a credit may be requested (see Sample 28). Follow these procedures:

1. Items must be returned for credit within 15 days of receipt.
2. Items must, in all respects, be fit for reissue as new stock.
3. Complete Stock Requisition--Credit, sending original and duplicate to Materiel Control.
4. Retain triplicate copy of this form for your records and make a Xerox copy and send to the individual who receives deliveries within your building or site.
5. The material delivered in error will be picked up at a late date.

Emergency Orders

Emergency telephone stock orders may be made, but should be limited to legitimate emergencies only. Emergency orders may be picked up by a member of the department or site staff at the Unified District Supply Center loading dock, Outgoing Stores. Be sure to inquire as to the address and time of the day this can be done.

Stock Requisitions Through Campus Stockrooms

The major campuses, City, Mesa & ECC (via City), operate stockrooms. The individual offices on campus will initiate their requests for stock supplies on their School Requisition forms, listing quantity,

stock number, description of item, unit and total costs. This form is submitted to the campus Business Office via the supervisor and appropriate administrator. The Business Office forwards all requests for stock items to the college stockroom.

Upon receipt of approved School Requisition for stock items, the stockroom personnel will:

1. Screen requisition for availability of items requested.
2. Check or circle actual quantity issued.
3. Some campuses transcribe the pertinent information on a "Stockroom Invoice."
4. Items that are not in stock are back-ordered.
5. Items not carried by the stockroom are requisitioned via telephone to the San Diego Unified School District Warehouse utilizing the budget account cited on the requisition. When the supplies arrive, they are delivered to the requesting department by the stockroom personnel.
6. At the end of each month, copies are sent to the Business Office Requisition or Budget Clerks for processing as necessary.

NONSTOCK REQUISITIONS

Nonstock Requisitions are used for ordering items that cannot be ordered through the Stock Catalog. Be sure to check your Stock Catalog before ordering an item on a Nonstock Requisition. The cost of an item purchased through stock is much less than purchasing it on the "open market." Please refer to Samples 29-32 for examples of four completed Nonstock Requisition forms. The procedures that follow refer frequently to these four samples.

Typing the Nonstock Requisition

Nonstock Requisition forms can be ordered through the Stock Catalog, 22-R-3210.

Nonstock Requisitions must be typed. Double space descriptions and leave four spaces between items. This is important for legibility because additional information is usually added when Purchasing actually orders the items. Each area of the Nonstock should be completed to the best of your knowledge. The number of each point below corresponds to the numbers on the sample Nonstock Requisition forms, Samples 29-32, included at the end of this section.

1. **Name of School or Other Location.** Be specific; type in exact name of ordering site (Department, in the case of Stadium Plaza offices).

2. **Deliver To - (If other than School or Department listed above).** In this case if the item ordered is to be delivered to a satellite (or off-campus) location.

3. **Date Ordered.** Type in the date the Nonstock Requisition is typed.

4. **Department.** Type in the department or office for which the item is being ordered and charged.

5. **Class Number if Books or Magazines.** Disregard (formerly a Unified School District requirement).

6. **Program Code.** One box should be checked. If the item is for general use (such as office supplies), check the box marked "Other" and enter "Office Supplies" on the blank line.

7. **District Equipment or N/S Number.** Disregard (formerly a Unified District requirement).

8. **Description.** Give a complete, detailed description. A good description shall include some or all of the following (see Samples 31 and 32):

   Basic name of the article
   Size
   Shape

Color
Material of which article is made
Name of manufacturer
Manufacturer's catalog number
Model number
Serial number

Review the following points before completing the description section on the requisition form:

a. More than one item may be placed on a Nonstock Requisition provided they are budgeted to the same account number (but no more than 4 items if they will have to be ordered from different vendors).

b. For all items, including books, start description at the far left of column 8.

c. Do not continue items onto a second page. The general rule is that one (1) Nonstock equals one (1) Purchase Order and one vendor. Also, avoid placing items on an attached list whenever possible. If it is absolutely necessary to use an attached listing, show items as "one lot" on the Nonstock with the entire listing on the attachment. (Do not split the listing between the Nonstock and the attachment. Long listings create partial shipments and payment difficulties.)

d. If you know that the only information you have is outdated, put it on the Nonstock anyway. Then attach a note telling the Purchasing Department that the information is outdated. (When researching an item, old information is better than no information.)

e. If the item requested was found in a catalog, give the title of the catalog, the page number, and the year the catalog was printed (also, a complete description in case the catalog is outdated). This information can make a big difference in pricing and availability.

f. If the item requested was found in a brochure or newspaper article, attach the brochure or article to the Nonstock. Make sure the vendor's name and address are on the brochure. Mark the item needed. The description of the item must still be typed in detail on the Nonstock Requisition.

g. If you have received a price quotation from a vendor or vendors, all information (including other vendor's and person's names) should be listed under description and all information and copies of written quotes should be attached and submitted with the Nonstock Requisition.

h. When ordering books, be sure to include all information in the following order (see Sample 30): Publisher, author, title, code number, other information. When ordering from more than one publisher on a Nonstock, alphabetize by publisher, then author.

i. If vendor must be prepaid, please indicate on your Nonstock Requisition "To Be Prepaid - Price List Dated _____," and attach the price list or order form.

j. Lease of equipment must include the period of time for which the lease is desired. For example: One year rental of Xerox Copier 4000, Serial Number 013524-336891 for the period 7/1/78 through 6/30/79.

k. If the equipment being requested is replacement equipment, show the name and serial number of the equipment being replaced at the bottom of the description column. If it is because the equipment has been lost or stolen, include that statement and a copy of the Property Damage or Loss Report.

l. The Purchasing Department does not encourage site personnel to make prior arrangements with a vendor. However, in certain instances it cannot be avoided. When this is the case, indicate the name of the person contacted and the date in the description portion of the Nonstock. Purchasing will confirm.

m. If the item or service has already been received by a site or office and has not yet been paid for, type the Nonstock as previously described and note in the description portion "Confirmation - Do Not Duplicate. See Attached Invoice #_____," and attach billing.

9. **Unit.** To the best of your knowledge, give the unit of the item to be ordered as follows: EA, BX, CTN, DZ, LOT, PKG, RM. If using BX, CTN, LOT or PKG, be sure to indicate the number of items in that unit in the description area; i.e., BX = 50 (see Sample 29).

10. **Quantity.** The quantity must correspond with the unit, i.e., if you order 30 books, Item 9 (Unit) would be EA and Item 10 (Quantity) would be 30 (see Sample 29).

11. **Cost:**

a. Unit price: This must correspond with Items 9 and 10. The price here is based on the cost of 1 unit of Item 9. For example, if the unit is DZ, the unit price should be per dozen.

b. Amount (or extension): Unit price multiplied by Item 10 should give you the total amount of that particular item.

c. Tax: Total of amount column x 6% = tax.

d. Total: Total of amount column plus tax = total.

12. **Suggested Vendor**. It is not essential to suggest a vendor, but it is helpful to the buyer. If you can suggest a vendor, please do. This does not mean, however, that if you list a "Suggested Vendor," that vendor will necessarily be used. Purchasing may know of another vendor who can give the District a better deal. Price is not the only or necessarily the most important consideration.

13. **Return Requisition After P.O. Written To.** Name of person preparing Nonstock (or person maintaining site Nonstock file) should be entered here.

    Too many people omit this item not realizing how important it really is. When Purchasing must return the original Nonstock to the originator, this is most helpful in making certain it is returned to the proper office and/or person.

14. **Signatures**. Signatures are **MANDATORY** - Nonstock cannot be processed without authorized signature of Management Services Officer/Management Services Supervisor/Budget Manager/ABSO Manager or their designee, plus additional signatures as required for capital outlay equipment, replacements, repairs, rentals, special projects, etc.

15. **Budget Coding**. Proper budget coding must be entered and verified by Management Services Officer/Management Services Supervisor/Budget Manager/ABSO Manager or their designee. Purchasing cannot be responsible for improper budget coding.

16. **Firm.** Generally, all items on a Nonstock Requisition are to be ordered from the same vendor. Occasionally, however, the buyer may be unable to obtain all of the items from one vendor, or he may elect to purchase certain items from another vendor. In these instances, more than one vendor will be used with a maximum of four per Nonstock. Sections A, B, C or D will be filled out with one for each vendor and/or Purchase Order (see Sample 30).

Route of Nonstock Requisition

The following are the essential stages of the Nonstock Requisition process:

1. Prepared at school or site location.

2. Site Dean or other authorizing signatures.

3. Management Services Officer/Management Services Supervisor/ Budget Manager/ABSO Manager authorization.

4. Budget Control as required from Stadium Plaza (special projects, equipment, rental, repair, etc.).

5. Purchasing.

6. Purchasing returns original to originator when Purchase Order has been issued to vendor. (When a Confirmation Purchase Order is issued, the original Nonstock is retained in Purchasing and a copy is returned to the site. This is because the original signatures on the Nonstock are the authorization to pay.)

Suggested Nonstock Follow-up Routine

1. Originator retains the pink or green copy and a copy is sent to the individual who receives material from the vendor for delivery to the requesting office.

2. Keep the office copy in a file or binder until the order is received. Some offices record all requests in a workbook, which forms a summary reference of all requests and shows their status.

3. When Purchasing returns the original with the purchase order number and vendor information, keep the original and discard the retained copy.

4. When the material is received, check the shipment against the original request to verify that the order is complete as ordered, and notify the person who originated the order that is has arrived. (All books should be stamped with the name of the site and/or office.)

5. Equipment received must be recorded for inventory control in a file, binder, or some other type of record. Record the piece of equipment, serial number, District number, who has the equipment, and where it is located.

6. The District sends a bi-weekly computer budget run that shows account balances by budget number. This budget run should be checked against the figures for each order, and the order copy should agree with those figures. If the budget run shows a large discrepancy on the amount of the order(s), or an order is shown that doesn't belong to your site or office, notify the Accounts Payable Office for adjustments to be made.

7. When you have received all the items listed on the Nonstock, in satisfactory condition, sign and date the "receiving set" of the purchase order. (If there is a problem, telephone the follow-up clerks in Purchasing for clarification.) The originator retains the green copy of the purchase order for the files and the remaining copies are returned to Purchasing. Attention must be given to the receiving function by the person responsible, because the signature is evidence that the order has been satisfactorily completed by the supplier and that payment should be made against the order.

8. Pull the original of the Nonstock, attach it to the green copy of the purchase order, and file as completed.

Nonstock Requisitions Through Campus Business Office

The individual offices on campus will initiate their requests for supplies and equipment on their School Requisition forms, listing quantity, a complete description of item, unit and total costs. This form is submitted to the campus Business Office via the supervisor and appropriate administrator.

The Business Office then types the San Diego Community College District Nonstock Requisition Form (22-R-3210) and forwards the original to Purchasing. The last two copies of the Nonstock are sent to the Stockroom to be matched with the "receiving set" pending delivery from the vendor and subsequent delivery to the office or person requesting the supplies or equipment.

PURCHASE ORDERS

The Purchase Order is an official document of the San Diego Community College District. It is valid only when signed by the Chancellor, Director of Business Services, or the Purchasing Manager. When a Purchase Order is accepted by the supplier to whom it is directed, it becomes a legal contract for the purchase and delivery of items specified thereon. Please refer to Samples 33 and 34 at the end of this section for examples of completed purchase orders.

Color Code

The Purchase Order is a prenumbered, multiple-page form consisting of eight copies. Each copy is a different color, and its designation is indicated on the upper left-hand corner of each copy.

1. **White or original.** The white copy is the vendor's copy and is delivered to the supplier, constituting a legal contract when accepted.

2. **Yellow, goldenrod, carbon white, green copies.** These constitute the "receiving set" which is forwarded to the college or department to which the supplier is requested to deliver the materials or services. When all items listed are satisfactorily received, the recipient signs and dates the set and forwards the first two copies to the Purchasing Department. The green copy accompanies the material to the originator or is sent to the site Business Office, and the white carbon is retained by the Stockroom.

3. **Pink.** This copy is retained in Purchasing, filed alphabetically, and used for follow-up purposes until the receiving set has been returned and an invoice received.

4. **Blue.** This copy is forwarded to the Accounts Payable Section for encumbrance immediately after the Purchase Order is written.

5. **Buff.** This copy is retained in Purchasing and filed numerically for the purpose of cross-reference.

Occasionally, it is necessary to make a change in the Purchase Order. This is accomplished by the Purchase Order Change Notice (see Sample 35). A copy is sent to the vendor, receiving point, site Business Office, Accounts Payable Section, and the Purchasing Department.

Payment Procedures

Upon receipt of the receiving set in Purchasing, the following steps are taken for payment:

1. The receiving set is matched to the pink (or follow-up)

copy. If an invoice has been received, it is attached to the receiving set and the pink copy and forwarded to the Purchasing Account Clerk.

2. The account clerk justifies the invoice with the Purchase Order. Items to be justified include, but are not limited to: unit price, sales tax, use tax, shipping and handling charges and any available discounts. The Buyer must approve any price increase of 10% or over, or any price increase on bid items.

3. When the above items have been justified, the pink, second copy of the invoice, and the receiving set are stamped "Approved" and forwarded with the invoices to the Accounts Payable section for payment. The pink purchasing copy is filed alphabetically in the purchasing "Paid Files." The green copy of the Purchase Order is returned to the site (with a confirmation order only) along with a copy of the Nonstock Requisition.

Common Reasons for Delayed Orders

If an order is not delivered on time, the cause may be one of the following:

1. Incorrect information: vendor cannot identify and/or price change necessary.

2. Vendor cannot meet delivery date.

3. Vendor ships wrong material.

4. Items are not available: buyer must seek a new source or vendor puts on "back order."

5. Quick Quote or Formal Bid is required.

6. Time required for authorized signatures and budget approval.

If a vendor does not receive payment on time, one of the following may be responsible:

1. Invoice or receiving set not received in Purchasing.

2. Receiving set not signed.

3. Incomplete deliveries.

4. Duplicate deliveries.

5. Invoice pricing may not conform to quote or bid price.

6. Waiting for credit invoices or substitute.

7. New vendor, or vendor has made a change in name and/or address. This requires new vendor code or updated information on existing codes. (Delays warrant receipt approximately two weeks in addition to the time it takes Accounts Payable to process payment.) Vendor may not receive payment for four to six weeks after delivery has been made.

8. County auditors find a discrepancy.

SAN DIEGO UNIFIED SCHOOL DISTRICT

STOCK REQUISITION

No. 11286

1 NAME OF SCHOOL OR OTHER LOCATION (DO NOT ENTER LOCATION NO.)	2 DATE ORDERED
BUSINESS SERVICES, SDCCD	1-5-81

SECONDARY SCHOOLS: COMPLETE ITEMS 3, 4 AND 14
ELEMENTARY SCHOOLS: COMPLETE ITEM 5 AND 14

3 DEPT. (ART, MUSIC, ETC.)	4 USING ACTIVITY
PURCHASING	

5 PROGRAM CODE (FOR COMPLETION BY SCHOOLS ONLY)

- ☐ INSTRUCTIONAL
- ☐ CAPITAL OUTLAY
- ☐ CUSTODIAL
- ☐ HEALTH SERVICES
- ☐ FOOD SERVICES
- X OTHER (EXPLAIN) Office Supplies

INSTRUCTIONS

A. Use this form to order only items listed as stock in the District Stock Catalog. Send original copy to Material Control.

B. Prepare separate requisitions for each Account Code. Enter Account Code in block 14.

C. Items 8 and 9 do not have to be completed unless desired for convenience of the orderer.

D. To assure receipt of stock on your next scheduled delivery, requisition must be in school mail two Wednesdays prior to the week of that delivery.

E. Enter in block 4 the using activity code. (Optional - 2 digit number)

6 STOCK NUMBER	7 Quant Wanted	8 Catalog Unit of Issue	9 DESCRIPTION	10 SCHOOL'S ESTIMATED COST	
				UNIT PRICE	AMOUNT
17-P-5640	3	DZ	Pencil, office, rubber-tipped, #3	35	1 05

SAMPLE

11 SPECIAL INSTRUCTIONS	If delivery is to other than your location, specify delivery location. If a Special Service purchase (P.T.A., Student Body, etc.) specify the service and enter "PT" or "SB" in block 4.	Total	1 . 05

180

12 PREPARED BY	13 SIGNATURE OF PRINCIPAL	14 ACCOUNT CODE
J. Glasgow	John Doe	0003 108 720 751

(Sample 27)

Original: white, Budget Office; copy: light green, School File Copy; 2nd copy: goldenrod, School Custodian

SAN DIEGO UNIFIED SCHOOL DISTRICT

STOCK REQUISITION--CREDIT

Nº 7513

1. NAME OF SCHOOL OR OTHER LOCATION (DO NOT ENTER LOCATION NO.): BUSINESS SERVICES, SDCCD
2. DATE: 1-27-81

SECONDARY SCHOOLS—COMPLETE ITEMS 3, 4 AND 15.
ELEMENTARY SCHOOLS—COMPLETE ITEMS 5 AND 15.

3. DEPT. (ART, MUSIC, ETC.): PURCHASING
4. USING ACTIVITY:

5. PROGRAM CODE (FOR COMPLETION BY SCHOOLS ONLY)
- ☐ INSTRUCTIONAL
- ☐ OPERATIONS
- ☐ FOOD SERVICES
- ☐ CAPITAL OUTLAY
- ☐ HEALTH SERVICES
- ☒ OTHER (EXPLAIN) Office Supplies

INSTRUCTIONS:

A. USE THIS FORM TO RETURN ONLY ITEMS LISTED AS STOCK IN THE DISTRICT STOCK CATALOG. SEND ORIGINAL AND DUPLICATE TO MATERIEL CONTROL OFFICE.

B. MAKE SEPARATE CREDIT REQUISITIONS FOR EACH MATERIAL CLASSIFICATION (e.g., CLASS 7, 25, 31) OR ACCOUNT CODE.

C. TO ASSURE RETURN OF STOCK ON YOUR NEXT SCHEDULED DELIVERY, CREDIT REQUISITION MUST BE IN SCHOOL MAIL TWO WEDNESDAYS PRIOR TO THE WEEK OF THAT DELIVERY.

D. INSERT CORRECT ACCOUNT CODE IN BLOCK 15.

E. REFER TO PROCEDURE 7965 FOR INSTRUCTIONS REGARDING RETURN OF MATERIAL FOR CREDIT.

6. STOCK NUMBER	7. QUANT.	8. CATALOG UNIT OF ISSUE	9. DESCRIPTION	10. STORES INVOICE AMOUNT	
				UNIT PRICE	AMOUNT
17-P-5640	3	DZ	Pencil, office, rubber-tipped, #3	35	1 05

S A M P L E

11. REASON FOR RETURN OF MATERIAL (SEE PROCEDURE 7965): Incorrect item ordered

Total: 1 . 05

ORIGINALLY ORDERED ON REQUISITION NO. 11286

ORIGINALLY RECEIVED ON STORES INVOICE NO. 00357

DATE MATERIAL RECEIVED 1-26-81

181

14. MATERIEL CONTROL USE ONLY:
APPROVED DATE PICK UP NO. DATE RECEIVED BY

12. PREPARED BY: J. Glasgow

13. SIGNATURE OF PRINCIPAL: John Doe

15. ACCOUNT CODE—MUST BE FILLED IN: 0003 108 720 751 (Sample 28)

XIX:18

22-R-3279 5-1M380-7

ORIGINAL, WHITE--MATERIEL CONTROL DUPLICATE, GOLDENROD--MATERIEL CONTROL TRIPLICATE, GREEN--ORIGINATOR'S FILE COPY

No. 37615

SAN DIEGO COMMUNITY COLLEGE DISTRICT
NONSTOCK REQUISITION

SAMPLE

1 NAME OF SCHOOL OR OTHER LOCATION (DO NOT ENTER LOCATION NO.): NORTH CITY ADULT CENTER

2 DATE ORDERED: 1-5-81

1A DELIVER TO (IF OTHER THAN SCHOOL OR DEPARTMENT LISTED ABOVE): Kearny Campus
7405 Mesa College Drive, San Diego, CA 92111

3 DEPT (ART, MUSIC, ETC.): BUSINESS EDUCATION

5 CLASS NUMBER IF BOOKS OR MAGAZINES:

6 PROGRAM CODE (FOR COMPLETION BY SCHOOLS ONLY)
☒ INSTRUCTIONAL ☐ FOOD SERVICES ☐ CAPITAL OUTLAY
☐ CUSTODIAL ☐ HEALTH SERVICES ☐ OTHER (EXPLAIN)

INSTRUCTIONS

a Use for all requests other than Stock or maintenance service. See district procedure 7010.
b Prepare separate requisitions for each budget classification.
c Books, magazines and sheet music: Indicate unit price in Col. 11. Alphabetize items by publisher and author.
d Send Original to Budget Office, retain duplicate. Original will be returned to Originator showing purchase order number, vendor and price.

FORM	7 DISTRICT EQUIP OR N/S NUMBER REQUIRED (IF ANY)	8 DESCRIPTION (IF BOOKS, LIST AUTHORS TO LEFT AND TITLES TO RIGHT OF PARTIAL LINE BELOW) Double space descriptions, leave 4 spaces between items	9 UNIT	10 QUANTITY WANTED	11 COST UNIT PRICE (Complete for Books)	11 COST AMOUNT
		Pen, Ball Point, green, medium ball, with eraser	DZ	2	3.00	6.00
		McGraw-Hill Book Company Sabin, William A., THE GREGG REFERENCE MANUAL, Fifth Edition, ISBN 0-07-054387-9, Text Edition	EA	30	5.50	165.00
		Folder, Pressboard, 1" expansion, legal size, individual plain tab, No. 525851-P BX = 50	BX	10	6.95	69.50

12 SUGGESTED VENDOR IF ANY: Stationers Corp.
9750 Distribution Ave.
San Diego, CA 92121

Gregg Division, McGraw Hill Book Company

TAX 14.43

13 RETURN REQUISITION AFTER P.O. WRITTEN TO (IF DIFFERENT LOCATION THAN IN BOX 1): J. Glasgow - North City Adult Center

TOTAL 254.93

14 SIGNATURE OF PRINCIPAL	DATE	15 APPROVAL OF SUPERVISOR OR BUS. OFFICE	DATE	16 (FOR BUDGET USE ONLY)
James Womack	1/5/81	Shirley Callard	1/6/81	0003 108 580 221 BUDGET

A FIRM			C FIRM		
SHIP TO	DEL TIME	F O B	SHIP TO	DEL TIME	F O B
VIA	C O D	BID/CONTRACT NO	VIA	C/D	BID/CONTRACT NO
BUYER	P O NO	P O DATE	BUYER	P O NO	P O DATE
B FIRM			D FIRM		
SHIP TO	DEL TIME	F O B	SHIP TO	DEL TIME	F O B
VIA	C O D	BID CONTRACT NO	VIA 182	C O D	BID/CONTRACT NO
BUYER	P O NO	P O DATE	BUYER XIX:19	P O NO	P O DATE (Sample 29)

TRIPLICATE - Green QUADRUPLICATE - Pink ORIGINAL — Canary DUPLICATE — White

No. 37615

SAN DIEGO COMMUNITY COLLEGE DISTRICT
NONSTOCK REQUISITION

SAMPLE

1 NAME OF SCHOOL OR OTHER LOCATION (DO NOT ENTER LOCATION NO.): NORTH CITY ADULT CENTER

2 DATE ORDERED: 1-5-81

4 DELIVER TO (IF OTHER THAN SCHOOL OR DEPARTMENT LISTED ABOVE): Kearny Campus
7405 Mesa College Drive, San Diego, CA 92111

3 DEPT (ART, MUSIC, ETC.): BUSINESS EDUCATION

5 CLASS NUMBER IF BOOKS OR MAGAZINES:

6 PROGRAM CODE (FOR COMPLETION BY SCHOOLS ONLY)
[X] INSTRUCTIONAL [ ] FOOD SERVICES [ ] CAPITAL OUTLAY
[ ] CUSTODIAL [ ] HEALTH SERVICES [ ] OTHER (EXPLAIN)

INSTRUCTIONS

a Use for all requests other than Stock or maintenance service. See district procedure 7010
b Prepare separate requisitions for each budget classification
c Books, magazines and sheet music: Indicate unit price in Col. 11. Alphabetize items by publisher and author
d Send Original to Budget Office, retain duplicate. Original will be returned to Originator showing purchase order number, vendor and price

A.M.	7 DISTRICT EQUIP. OR N.S. NUMBER REQUIRED (IF ANY)	8 DESCRIPTION (IF BOOKS, LIST AUTHORS TO LEFT AND TITLES TO RIGHT OF PARTIAL LINE BELOW) Double space descriptions, leave 4 spaces between items	9 UNIT	10 QUANTITY WANTED	11 COST: UNIT PRICE (Complete for Books)	11 COST: AMOUNT
A		Pen, Ball Point, green, medium ball, with eraser	DZ	2	3.00	6.00
B		McGraw-Hill Book Company Sabin, William A., THE GREGG REFERENCE MANUAL, Fifth Edition, ISBN 0-07-054387-9, Text Edition	EA	30	5.50	165.00
A		Folder, Pressboard, 1" expansion, legal size, individual plain tab, No. 525851-P BX = 50	BX	10	6.95	69.50

12 SUGGESTED VENDOR (IF ANY): Stationers Corp., 9750 Distribution Ave., San Diego, CA 92121 — Gregg Division, McGraw Hill Book Company

TAX: 14.43

13 RETURN REQUISITION AFTER P.O. WRITTEN TO (IF DIFFERENT LOCATION THAN IN BOX 1): J. Glasgow - North City Adult Center

TOTAL: 254.93

14 SIGNATURE OF PRINCIPAL: James Womack DATE: 1/5/81

15 APPROVAL OF SUPERVISOR OR BUS. OFFICE: Shirley Callard DATE: 1/6/81

16 (FOR BUDGET USE ONLY): 0003 108 580 221 BUDGET

A FIRM: Stationers Corp.

SHIP TO	DEL TIME	F.O.B.
M+W	10D	Dest
VIA	C.O.D.	BID/CONTRACT NO
YW	Let 30	—
BUYER	P.O. NO.	P.O. DATE
LG	12345	1-8-81

B FIRM: Gregg/McGraw Hill

SHIP TO	DEL TIME	F.O.B.
M+W	10D	Dest
VIA	C.O.D.	BID/CONTRACT NO
YW	Let 30	—
BUYER	P.O. NO.	P.O. DATE
JH	12346	1-8-81

C FIRM:

SHIP TO	DEL TIME	F.O.B.
VIA	C.O.D.	BID/CONTRACT NO
Completed by buyer		
BUYER	P.O. NO.	P.O. DATE
as well as "A" and "B"		

D FIRM: designations above

SHIP TO	DEL TIME	F.O.B.
VIA	C.O.D.	BID/CONTRACT NO
BUYER	P.O. NO.	P.O. DATE
		(Sample 30)

TRIPLICATE - Green QUADRUPLICATE - Pink ORIGINAL — Canary DUPLICATE — White

XIX: 20

No. 37616

SAN DIEGO COMMUNITY COLLEGE DISTRICT
NONSTOCK REQUISITION

SAMPLE

1 NAME OF SCHOOL OR OTHER LOCATION (Do not enter location no.): NORTH CITY ADULT CENTER

2 DATE ORDERED: 1-5-81

4 DELIVER TO (IF OTHER THAN SCHOOL OR DEPARTMENT LISTED ABOVE): Kearny Campus
7405 Mesa College Drive, San Diego, CA 92111

3 DEPT. (ART, MUSIC, ETC.): BUSINESS EDUCATION

5 CLASS NUMBER IF BOOKS OR MAGAZINES:

6 PROGRAM CODE (FOR COMPLETION BY SCHOOLS ONLY)
☐ INSTRUCTIONAL ☐ FOOD SERVICES XX CAPITAL OUTLAY
☐ CUSTODIAL ☐ HEALTH SERVICES ☐ OTHER (EXPLAIN)

INSTRUCTIONS

a. Use for all requests other than Stock or maintenance service. See district procedure 7010.
b. Prepare separate requisitions for each Budget classification.
c. Books, magazines and sheet music: Indicate unit price in Col. 11. Alphabetize items by publisher and author.
d. Send Original to Budget Office, retain duplicate. Original will be returned to Originator showing purchase order number, vendor and price.

ITEM	7 DISTRICT EQUIP. OR N.S. NUMBER REQUIRED (IF ANY)	8 DESCRIPTION (IF BOOKS, LIST AUTHORS TO LEFT AND TITLES TO RIGHT OF PARTIAL LINE BELOW) Double space descriptions; leave 4 spaces between items	9 UNIT	10 QUANTITY WANTED	11 COST: UNIT PRICE (Complete for Books)	11 COST: AMOUNT
Incorrect		IBM Selectric Typewriter		1		
Correct		Typewriter, IBM Correcting Selectric, Dual Pitch, 15" carriage, half space ratchet, color - blue, with the following elements: Artisan 72, 12 Pitch Manifold 72, 10 Pitch	EA	1	890.00	890.00

12 SUGGESTED VENDOR (IF ANY): IBM Corporation

TAX: 53.40

13 RETURN REQUISITION AFTER P.O. WRITTEN TO (IF DIFFERENT LOCATION THAN IN BOX 1): J. Glasgow - North City Adult Center

TOTAL: 943.40

14 SIGNATURE OF PRINCIPAL | DATE

15 APPROVAL OF SUPERVISOR OR BUS OFFICE | DATE

16 (FOR BUDGET USE ONLY): 0003 308 580 221

A FIRM			C FIRM		
SHIP TO	DEL. TIME	F.O.B.	SHIP TO	DEL. TIME	F.O.B.
VIA	C.D.	BID/CONTRACT NO.	VIA	C/D	BID/CONTRACT NO.
BUYER	P.O. NO.	P.O. DATE	BUYER	P.O. NO.	P.O. DATE
B FIRM			D FIRM		
SHIP TO	DEL. TIME	F.O.B.	SHIP TO	DEL. TIME	F.O.B.
VIA	C.D.	BID CONTRACT NO.	VIA	C.D.	BID/CONTRACT NO.
BUYER	P.O. NO.	P.O. DATE	BUYER	P.O. NO.	P.O. DATE (Sample 31)

TRIPLICATE - Green QUADRUPLICATE - Pink ORIGINAL — Canary DUPLICATE — White

XIX:21

No. 37617

SAN DIEGO COMMUNITY COLLEGE DISTRICT
NONSTOCK REQUISITION

SAMPLE

1 NAME OF SCHOOL OR OTHER LOCATION (DO NOT ENTER LOCATION NO.): NORTH CITY ADULT CENTER

2 DATE ORDERED: 1-5-81

4 DELIVER TO (IF OTHER THAN SCHOOL OR DEPARTMENT LISTED ABOVE): Kearny Campus
7405 Mesa College Drive, San Diego, CA 92111

3 DEPT (ART, MUSIC, ETC.): BUSINESS EDUCATION

5 CLASS NUMBER IF BOOKS OR MAGAZINES:

6 PROGRAM CODE (FOR COMPLETION BY SCHOOLS ONLY)
☐ INSTRUCTIONAL ☐ FOOD SERVICES ☐ CAPITAL OUTLAY
☐ CUSTODIAL ☐ HEALTH SERVICES ☐ OTHER (EXPLAIN)

INSTRUCTIONS

a Use for all requests other than Stock or maintenance service. See district procedure 7010.
b Prepare separate requisitions for each budget classification.
c Books, magazines and sheet music: Indicate unit price in Col. 11. Alphabetize items by publisher and author.
d Send Original to Budget Office; retain duplicate. Original will be returned to Originator showing purchase order number, vendor and price.

#	7 DISTRICT EQUIP OR N.S. NUMBER REQUIRED (IF ANY)	8 DESCRIPTION (IF BOOKS, LIST AUTHORS TO LEFT AND TITLES TO RIGHT OF PARTIAL LINE BELOW) Double space descriptions; leave 4 spaces between items	9 UNIT	10 QUANTITY WANTED	11 COST: UNIT PRICE (Complete for Books)	11 COST: AMOUNT
	Discount	Please pay attached invoice CONFIRMATION ONLY DO NOT DUPLICATE				48.28
	Correct	Roller, Form, #120W-361-A1S CONFIRMATION Per attached invoice #4474156 dated 12/29/80	EA	1	45.55	45.55

12 SUGGESTED VENDOR, IF ANY: A.M. International
7323 Engineer Road, SD 92111

TAX 2.73

TOTAL 48.28

13 RETURN REQUISITION AFTER P.O. WRITTEN TO (IF DIFFERENT LOCATION THAN IN BOX 1): J. Glasgow - North City Adult Center

14 SIGNATURE OF PRINCIPAL | DATE | 15 APPROVAL OF SUPERVISOR OR BUS. OFFICE | DATE | 16 (FOR BUDGET USE ONLY): 0003 108 580 221

A FIRM			C FIRM		
SHIP TO	DEL. TIME: Received	F.O.B.	SHIP TO	DEL. TIME	F.O.B.
VIA	C.O.D.	BID/CONTRACT NO.	VIA	C/D	BID/CONTRACT NO.
BUYER	P.O. NO.	P.O. DATE	BUYER	P.O. NO.	P.O. DATE
B FIRM			D FIRM		
SHIP TO	DEL. TIME	F.O.B.	SHIP TO	DEL. TIME	F.O.B.
VIA	C.O.D.	BID CONTRACT NO.	VIA	C.O.D.	BID/CONTRACT NO.
BUYER	P.O. NO.	P.O. DATE	BUYER	P.O. NO.	P.O. DATE (Sample 32)

185

TRIPLICATE - Green QUADRUPLICATE - Pink ORIGINAL — Canary DUPLICATE — White

XIX: 22

INVOICE IN TRIPLICATE TO:

SAN DIEGO COMMUNITY COLLEGE DISTRICT

PURCHASE ORDER 12345

VENDOR COPY

PURCHASING DEPARTMENT
3375 CAMINO DEL RIO SOUTH • SAN DIEGO, CALIFORNIA 92108
PHONE: (714) 230-2181

SHOW THIS NUMBER ON ALL INVOICES, SHIPMENTS AND CORRESPONDENCE

NO GOODS RECEIVED AFTER 3:30 P.M.

STATIONERS CORPORATION
9750 DISTRIBUTION AVENUE
SAN DIEGO, CA 92121

SHIP TO:
SAN DIEGO COMMUNITY COLLEGE DISTRICT
MAINTENANCE AND WAREHOUSE
1536 MURRAY CANYON RD.
SAN DIEGO, CA 92108

LG:JG

DATE	DEL BEFORE	F.O.B	VIA	CASH DISCOUNT	BID NO.
1 8 81	1 22 81	DEST.	YOUR WAY	NET 30	

ITEM NO.	ARTICLE AND DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	% DISC	EXTENSION
1	PEN, BALL POINT, GREEN, MEDIUM BALL, WITH ERASER	DZ	2	3.00		6.00
2	FOLDER, PRESSBOARD, 1" EXPANSION, LEGAL SIZE, INDIVIDUAL PLAIN TAB, NO. 525851-P BX = 50	BX	10	6.95		69.50

VOID
Sample Only

PLEASE NOTE: If prices or quantities exceed those shown on this Purchase Order, please notify the Purchasing Dept. and obtain approval before filling order.

SALES TAX	6.00	4.53
TOTAL		80.03

AN EQUAL OPPORTUNITY EMPLOYER

IMPORTANT
See Reverse Side For Conditions

Vendor does not receive shaded area below.

BY W.A. ROBERTSON, PURCHASING MANAGER

NORTH CITY ADULT CENTER, KEARNY CAMPUS
7405 Mesa College Drive, SD 92111 BUSINESS EDUCATION

☐ PARTIAL SHIPMENT DO NOT REORDER

80/81

INVOICE NUMBER	INVOICE DATE	ACCOUNT NUMBER FUND	ACCT	C.C.	PROG	INVOICE AMOUNT	CR	DIS CNT	P/T	ENCUMBRANCE AMOUNT	CR	NON STOCK REQUISITION #
		0003	108	580	221					80 03		37615
									18			
						XIX:23						(Sample 33)

INVOICE IN TRIPLICATE TO:

SAN DIEGO COMMUNITY COLLEGE DISTRICT

PURCHASE ORDER 12346

VENDOR COPY

PURCHASING DEPARTMENT
3375 CAMINO DEL RIO SOUTH • SAN DIEGO, CALIFORNIA 92108
PHONE: (714) 230-2181

SHOW THIS NUMBER ON ALL INVOICES, SHIPMENTS AND CORRESPONDENCE

NO GOODS RECEIVED AFTER 3:30 P.M.

GREGG DIVISION
MC GRAW-HILL BOOK COMPANY
8171 REDWOOD HIGHWAY
NOVATO, CA 94947

SHIP TO:
SAN DIEGO COMMUNITY COLLEGE DISTRICT
MAINTENANCE AND WAREHOUSE
1536 MURRAY CANYON RD.
SAN DIEGO, CA 92108

JH:JG

DATE	DEL BEFORE	F.O.B.	VIA	CASH DISCOUNT	BID NO.
1 8 81	1 22 81	DEST.	YOUR WAY	NET 30	

ITEM NO.	ARTICLE AND DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	% DISC	EXTENSION
	MC GRAW-HILL BOOK COMPANY					
	SABIN, WILLIAM A.					
	THE GREGG REFERENCE MANUAL, FIFTH EDITION					
	ISBN 0-07-054387-9 TEXT EDITION	EA	30	5.50		165.00
	VOID Sample Only					
	SALES TAX			6.00		9.90
	TOTAL					174.90

PLEASE NOTE: If prices or quantities exceed those shown on this Purchase Order, please notify the Purchasing Dept. and obtain approval before filling order.

AN EQUAL OPPORTUNITY EMPLOYER

IMPORTANT
See Reverse Side For Conditions

Vendor does not receive shaded area below

BY W.A. ROBERTSON, PURCHASING MANAGER

NORTH CITY ADULT CENTER, KEARNY CAMPUS
7405 Mesa College Drive, SD 92111 BUSINESS EDUCATION

☐ PARTIAL SHIPMENT DO NOT REORDER

80/81

INVOICE NUMBER	INVOICE DATE	ACCOUNT NUMBER FUND	ACCT	C.C.	PROG.	INVOICE AMOUNT	CR	DIS CNT	P/T	ENCUMBRANCE AMOUNT	CR	NON STOCK REQUISITION #
		0003	108	580	221					174 90		37615
						XIX:24		187				(Sample 34)

BUS-P0001-10-79

SAN DIEGO COMMUNITY COLLEGE DISTRICT
Purchasing Department
3375 Camino Del Rio South
San Diego, California 92108

PURCHASE ORDER CHANGE NOTICE

GREGG DIVISION
MC GRAW-HILL BOOK COMPANY
8171 REDWOOD HIGHWAY
NOVATO, CA 94947

S A M P L E

JANUARY 15, 1981

REFER TO:

PURCHASE ORDER NO. 12346

PURCHASE ORDER DATE 1/8/81

VENDOR #

NATURE OF CHANGE:
- ☐ Specification
- ☒ Price
- ☒ Quantity
- ☐ Cancellation
- ☐ Other

Change Purchase Order Now In Your Possession As Follows:

UNIT	QUANTITY	UNIT PRICE	% DISC.	EXTENSION
EA	20	4.35		87.00

MC GRAW-HILL BOOK COMPANY

SABIN, WILLIAM A.

THE GREGG REFERENCE MANUAL, FIFTH EDITION

ISBN 0-07-054387-9 TEXT EDITION

Note: Vendor does not receive information below signature.

W.A. Robertson
W.A. Robertson, Purchasing Manager

REASON FOR CHANGE REQUEST OF SITE AND DISCOUNT AVAILABLE

DEPARTMENT OR SITE
NORTH CITY ADULT CENTER
KEARNY CAMPUS, 7405 MESA COLLEGE DRIVE

FY 80/81

BUS-PG-002-10/80

ACCOUNT NUMBER FUND	ACCT	CC	PROG	ENCUMBRANCE AMOUNT		NON STOCK REQUISITION #	
0003	108	580	221	174	90	37615	A
							A
							A
	XIX:	25		188		(Sample 35)	A

TRAVEL AND MILEAGE

TRAVEL

A secretary needs to be able to arrange business trips, conduct the business of the office while the boss is away, and follow up on activities resulting from trips.

Preplanning

1. **Prepare an itinerary.** Find out the preferred time of departure, destination and stops along the way, means of travel, type of accommodations preferred, and whether or not car rentals will be necessary. Refer to the Administrative Procedures Manual, Section 8960.2, to familiarize yourself with District policy on making reservations, securing travel advances, and reporting expenses.

2. **Set up a travel folder.** As soon as a trip is proposed, set up a folder in which you can place all pertinent materials, such as papers to be taken on the trip, places and people to be visited, times at which the boss must be in certain places, and if several stops are involved, the time at which it will be possible to leave each city. Then prepare a tentative itinerary in pencil, checking off confirmations as they come in.

3. **Make travel reservations.** Contact the District-contracted travel agency for travel reservations. Give the travel agent the following information: a) the traveler's name, b) the travel request form number, c) all the information on your tentative itinerary, and d) any details particular to this trip. The agent will be able to tell you what airline services the destination and the flight time and cost of each. The agent can also arrange car rentals and provide you with names of hotels in the area.

4. **Arrange for hotel accommodations.** In making hotel reservations, be sure to furnish the hotel with the following information: a) your boss's name and address, b) the date and approximate time of arrival, c) the date of departure, d) the type and quality of room requested. If the arrival time is indefinite, or is after 6:00 p.m., ask that the room be held for late arrival and ask for written confirmation. Most conventions have prearranged with hotels for rooms, so be sure to state the convention/conference to be attended, so the appropriate lower rate can be given.

Travel Requests

A "Travel Request With Expenses" should be completed when "actual and necessary expenses" are to be reimbursed by the District. A "Travel Request Without Expenses" should be completed when there is to be no reimbursement.

Requests for in-state trips should be sent to the District Cashier at Stadium Plaza at least one week prior to the trip. The cashier will check them for the proper signatures and budget code and be alerted to incoming airline tickets. If the trips are to be charged to a Special Project, one of the Project Accountants will check and approve the expenditure. The forms will then be sent to the Chancellor's Office for approval. After Chancellor's approval, they are listed on a weekly Travel List which is scheduled to be typed each Friday. On Monday, the expense form copies are returned to the secretary at the originating site. Airline tickets for the in-state trips are held until the Request Forms are received.

Requests for out-of-state trips should be received by the District Cashier at least two weeks before the Board of Trustees Business Meeting held prior to the start of the trip. These requests are approved by the Project Accountants, if needed, and then sent to the Chancellor's Office. They have to be approved and typed on a list for the Board Docket at least one week prior to the Board of Trustees Business Meeting. The expense claim forms and airline tickets will be released the day after they are approved by the Board of Trustees.

Completing the "Travel Request With Expenses" Form

Before filling out this form, refer to Sample 36 at the end of this section and review the following instructions:

1. Read all instructions on the back of the form.
2. Fill in the form with the typewriter.
3. Put in site name, not just the department.
4. Put complete name of organization, not just the initials (initials cannot be used on Board Dockets).
5. The Position Title is the Job Classification.
6. Be sure to list both the city and state where the meeting is being held.
7. For the inclusive dates, if additional days are needed for air travel, list them in brackets above the conference dates and indicate that it is for travel.
8. Include the cost of air travel in the expense limitation.
9. The form must be signed by the President or Director, then sent to the District Cashier for approval processing.
10. The budget code should be initialed by the Budget Control Clerk so Finance knows funds are available.
11. Do not fill in any of the claim portion until after the trip is completed.
12. Attach copies of pertinent data on meeting/conference/convention being requested to attend.
13. It is suggested the secretary make a copy of the typed claim form and hold for her records.
14. In computing the estimated expense limitation, be sure to include total cost of airline fare (or mileage involved if driving), hotel room costs plus room taxes, convention registration fees, probable costs of taxis, tips, phone calls, baggage fees, etc. Try to be as close as possible in your estimate. In typing the expense limitation on the form, it is suggested you put "Approximate $_____."

Completing the "Travel Request Without Expenses" Form

When no reimbursement of expenses is to take place, it is necessary to fill out the "Travel Request Without Expenses" form (see Sample 37). For in-state trips, the form needs to be approved by the President or Director; for out-of-state trips, the form should be sent to the Chancellor's Office for approval. It is suggested that the secretary make a copy for her files.

Before Departure

The secretary should take the following action before the boss leaves:

1. For an extended trip, notify at least 48 hours before the departure any District associates who have frequent contact with your boss so that they can arrange a last-minute meeting on any urgent matters.

2. Check the office calendar to be sure no important meetings are due to come up, and check any deadlines that may be pending.

3. Learn who is to make decisions during your boss's absence. Find out how you are to handle important letters and/or reports to be completed.

4. Check tickets and confirmations when they arrive. Make sure they specify the times, dates, destinations, and accommodations you requested.

5. Type the final schedule and itinerary. It should be so complete that your boss will know at all times exactly where to go and when to be there. It should include details about all appointments. Make extra copies of this for yourself, and send one home with your boss for his/her family. Sample 38 provides a format for preparing an itinerary.

While the Boss is Away

After the departure, you will be responsible for many duties.

By keeping the following records, you will be able to bring your boss up to date quickly and accurately.

1. Keep a list of all incoming letters with all pertinent information: arrival, date, name of sender, brief description of the contents, and what action, if any, you have taken.

2. List all telephone calls and all necessary details concerning those calls.

3. Keep a list of office visitors.

When the Boss Returns

1. Bring your boss up to date. Report briefly, as soon as possible, what has happened in the office during the trip, and present the lists.

2. Have your work planned so that you are free to help clear up accumulated business. If file folders were taken along on the trip, check them to be sure they are complete and return them to the files. Try to keep the appointment calendar as free as possible so that there is time to catch up on the work.

3. If your boss has requested that certain materials be sent from some of the places visited, follow up to be sure that all of them have arrived. If the boss has been entertained while on the trip, draft thank you notes as soon as possible.

4. Complete the expense accounting as soon as possible. It is suggested that you give your boss the copy you have made of the claim form and have him/her write in pencil the expenses incurred on the trip. You can use this copy to type the expense portion of the original claim. Check each claim to make sure that:

   a. All required receipts are attached.

   b. All appropriate signatures are on the claim, including those of the traveler and the responsible administrator.

   c. The total claim should not exceed the amount approved.

   d. The dates claimed are the same dates approved for travel.

Note: Reimbursement for travel in San Diego is limited to the registration fee and one meal per day, not to exceed three days. Mileage should be claimed on the monthly mileage form.

5. Forward both copies of the expense claim to Business Services for reimbursement, and file your copy in your files.

Some Additional Suggestions

1. Build your own travel and hotel information library.

2. Keep a log of all trips taken, both with and without expenses. For each trip, list the activity, date, location, and cost to the District. Keep the copy of the completed claim form behind the log. This practice compiles a good travel picture of your individual office (if more than one staff member is involved in travel activities) or of your immediate supervisor. At the end of the school year, it provides a good basis for developing a travel budget for the next year.

MILEAGE

Any District employee who is required to use his/her personal car for travel on District business as a regular and recurring part of his/her assignment, or an employee who has prior approval of the responsible administrator for the performance of emergency and short-range requirements, may claim mileage reimbursement for use of his/her personal car provided he/she has requested and received approval, funds are budgeted and available, and the travel is within San Diego County. Reimbursement is at the Board-approved rate.

Computing Mileage

The starting and finishing points are the regular headquarters of the employee. Mileage shall be calculated from the regular headquarters to the various destinations, and return to the headquarters.

In the event the employee does not visit his/her headquarters prior to the first trip on District business on any one day, he/she shall deduct from the total mileage: 1) the distance from his/her home to the first stop, or 2) the distance from his/her home to the headquarters, whichever is lesser.

In the event the employee proceeds from his/her last destination on District business in any one day to his/her home, the employee shall deduct from the total mileage: 1) the distance from the last destination to home, or 2) the distance from the regular headquarters to home, whichever is lesser.

Filing for Reimbursement

1. Personal mileage is reported on the form "Monthly Request for Mileage Refund for Privately Owned Cars" (see Sample 39). This form consists of three copies, all of which must be sent to Accounting:

   a. Original (white) copy is for the District files.
   b. Second (yellow) copy is for the County.
   c. Third (pink) copy is for the employee, sent with reimbursement check.

2. Claim may be on any of the District's three funds:

   a. Special Reserve Fund
   b. Child Development Fund
   c. General Fund

3. Each claim form must include:

   a. Employee name.
   b. Specific delivery location (e.g., Mesa, Room H201) - check will be mailed to work location, not to home.
   c. A valid budget number.
   d. Employee's signature.
   e. Administrator's signature.

   By signing the mileage reimbursement claim, the administrator is guaranteeing that the employee has used his/her own vehicle in the performance of official duties within San Diego County.

4. Check the claim for excessive daily mileage. If the daily claim is for more than 100 miles, verify that these miles were in-County. Out-of-District driving is reported on another form and must be approved by the Chancellor or the Board of Trustees.

5. More than one month may be entered on the reimbursement claim provided the entire claim is to be charged to the same budget number. Do not submit a mileage claim for reimbursement for less than $10.00.

6. Each employee should maintain a daily mileage report for audit purposes and have it available for review by the administrator when the claim is submitted for approval. These records are subject to audit and must be retained by the employee for at least the year after the close of the fiscal year during which the claim was made. It is also advised that the employee keep the pink copy of the claim, which is returned in a window envelope with the check.

Approximate One-Way Mileage from Stadium Plaza

Location	# of Miles
City College	7.0
Mesa College	7.5
Miramar College	12.5
Educational Cultural Complex	9.0
Adult Headquarters	4.9
Centre City Adult	7.0
Midway Adult	9.0
Navajo Adult	7.5
North Shores Adult	17.0
North City Adult	11.5

TRAVEL REQUEST WITH EXPENSES

Important: See instructions reverse side of last copy

SAN DIEGO COMMUNITY COLLEGE DISTRICT

TR- 00201

PERMISSION IS HEREBY REQUESTED TO TRAVEL AS INDICATED BELOW

(Typewritten) Name			Substitute Needed
First: JANE	Middle Initial: D.	Last: DOUGH	☒ No ☐ Yes

Site & Department	Home Address (Include Zip Code)	Home Phone
Stadium Plaza, Program for Disabled	1516 Campus Avenue, SD 92116	295-5457

Name of Organization (if any)
California Community Junior Colleges Association (CCJCA) Convention

City	State	Inclusive Dates
Sacramento	CA	April 16-19, 1980

Member of Organization	Position Title
☐ No ☒ Yes	Counselor-Specialist

Purpose of Meeting and Potential Benefit to District
To attend annual convention; to meet with other professionals in State postsecondary education; to meet with Commission on the Handicapped.

Requested by (Signature)	Approval (Signature)
Jane Dough	L A Boss

FOR BUSINESS SERVICES/ACCOUNTING USE ONLY

I hereby certify that the Governing Board in a meeting held _____ 19____ took action in accordance with Education Code Section 87032 to direct the above named employee to take the above trip in performance of service for the district:

(Signature) _____
Accounting Manager

Date _____

Expense Limitation: Approx. $350.00

METHOD OF TRAVEL
- ☒ AIR
- ☐ TRAIN OR BUS
- ☐ RENTAL CAR
- ☐ PERSONAL CAR

(SEE SPECIAL NOTE REVERSE SIDE OF LAST COPY)

CLAIM AGENDA COPY

	ITEM	SUN	MON	TUES	WED	THURS	FRI	SAT
NO RECEIPTS REQUIRED	BREAKFAST			2.64	2.55	3.20		
	LUNCH			5.21	6.25			
	DINNER			10.55	11.60			
	TAXICAB, CITY BUS, AIRPORT LIMOUSINE, PARKING							
	BAGGAGE TRANSFER - CHECKING		2.50			2.50		
	TELEPHONE - TELEGRAPH		1.55	3.45		1.50		
	TRANSPORTATION BY PERSONAL CAR TOTAL NO. MILES____ @ 15¢ = $ _____ (Reimbursement not to exceed coach air fare)							
REQUIRED RECEIPTS	LODGING HOTEL, MOTEL, ETC		42.20	42.20	42.20			
	CONVENTIONAL REGISTRATION FEES		20.00					
	TRANSPORTATION ☐ PURCHASED BY SELF (Include in claim) ☒ PURCHASED BY DISTRICT TRAVEL AGENCY (Do not include in claim) AMOUNT $110.00							
	OTHER ITEMIZE							
EMPLOYEE (SIGNATURE) Jane Dough	DAILY TOTALS		66.25	64.05	62.60	7.20		

ADMINISTRATIVE APPROVAL L A Boss DATE 4-21-80

TOTAL of CLAIM $200.10

ACCOUNT NUMBER FUND	ACCT	CC	PROG	I.D. NUMBER	AMOUNT	VENDOR NUMBER
3010	265	804	653		$200.10	
				XX:09	197	(Sample 36)

BUS DP 014 10/80

EXPENSE CLAIM

TRAVEL REQUEST WITHOUT EXPENSES

Procedure No. AC 4817

SAN DIEGO COMMUNITY COLLEGE DISTRICT

Name				Substitute Needed
First: JANE	Middle Initial: P.	Last: DOUGH		XX No ☐ Yes
College or Department: Stadium Plaza-Handicapped Loc. # 190	Home Address (Include Zip Code): 1516 Campus Avenue, SD 92116		Home Phone: 295-5457	

PERMISSION IS HEREBY REQUESTED TO TRAVEL AS INDICATED BELOW

Name of Organization (If any): California Community Junior Colleges Association (CCJCA) Convention

Member of Organization	Title
☐ No XX Yes	Coordinator

Purpose of Meeting and Potential Benefit to District:

To attend annual convention; to meet with other professionals in State postsecondary education; to meet individually with Commission on the Handicapped.

Place	Inclusive Dates
Senator Hotel Sacramento, California	April 16-19, 1979
Requested by (Signature): Jane Dough	Approval (Signature): J. A. Bass

650-5-10M-1/75-1

XX:10 (Sample 37)

ITINERARY

CCJCA Convention
April 16-19, 1979
Sacramento

MONDAY, April 16

9:00 p.m. — Leave San Diego, PSA Flight #111.

10:32 p.m. — Arrive Sacramento. Transportation has been arranged to the hotel.
Accommodation: Reservation at the Senator Hotel, 1131 "L" Street (916-442-5081) for a single room, second-floor level, reservation guaranteed for late arrival. Convention will be held in this hotel.

TUESDAY, April 17

10:00 a.m. — Formal opening of convention. See Agenda in your briefcase.

REMINDERS:

1. List of Commission members you particularly want to see is in your briefcase, marked "Special List".
2. Arrange with hotel to have private dining room for Wednesday luncheon with these Commission members.
3. Call John Leslie to learn if he will be free for one or more of your special conferences and for the private luncheon Wednesday.

WEDNESDAY, April 18

REMINDERS:

1. Recheck return reservation to San Diego, PSA Flight #061, leaving Thursday, 11:30 a.m.

12:30 p.m. — Luncheon with special group of Commission members in private dining room.

7:30 p.m. — Formal banquet, preceded by cocktails.

THURSDAY, April 19

11:30 a.m. — Leave Sacramento, PSA Flight #061.

12:35 p.m. — Arrive San Diego.

District Travel Request #15880
Board approved 2-28-79.

SAN DIEGO COMMUNITY COLLEGE DISTRICT
3375 Camino Del Rio South, San Diego, Calif. 92108

— MONTHLY REQUEST FOR MILEAGE REFUND FOR PRIVATELY OWNED CARS —

DO NOT WRITE IN THIS SPACE

Home Address 1952 Main (STREET)

City San Diego, CA ZIP 92101

Name JOHN (FIRST) M. (MI) DOUGH (LAST) (PLEASE PRINT)

Mesa College, Room H-201
Site & Department

SEND ALL THREE COPIES OF THIS REPORT TO BUSINESS SERVICES/ACCOUNTING
ONE COPY WILL BE RETURNED TO YOU WITH YOUR WARRANT.

THIS WILL BE IN PAYMENT OF MILEAGE AS LISTED BELOW. (ED. CODE 87033)
DAILY REPORT OF MILEAGE ON DISTRICT BUSINESS

DATE	MILEAGE	DATE	MILEAGE	DATE	MILEAGE	DATE	MILEAGE	DATE	MILEAGE	DATE	MILEAGE
1-6	3	1-16	12								
1-9	3	1-17	3								
1-10	3	1-18	36								
1-11	42	1-19	57								
1-12	26	1-23	18								
1-13	18									TOTAL MILEAGE	221

I hereby certify that the travel above was accomplished in the performance of my official duties; that the information given is correct; that no part of the travel was performed outside the San Diego County and I hereby present my claim for refund.

THIS CLAIM IS SUBJECT TO AUDIT

Mileage for month ending January 31, 19 80.

Total mileage 221 at .25 cents per mile Total $ 55.25

John M Dough — Employee's payroll signature

J. A. Boss — Approved by Designated Administrator

PLEASE SEE REVERSE SIDE OF THIRD COPY FOR IMPORTANT INSTRUCTIONS.
For further information, call Business Services/Accounting

ACCOUNT NUMBER FUND	ACCT	CC	PROG	I.D. NUMBER	AMOUNT	NAME
3010	264	804	653		55 25	JOHN M. DOUGH

BUS-DP-009-10/80

XX:12

(Sample 39)

200

BIBLIOGRAPHY

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Bloom, Lynn; Coburn, Karen; and Pearlman, Joan. THE NEW ASSERTIVE WOMAN. New York: Delacorte Press, 1975.

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Doris, Lillian; and Miller, Besse. COMPLETE SECRETARY'S HANDBOOK. 3rd ed. Englewood Cliffs: Prentice-Hall, Inc., 1974.

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James, Muriel. THE OK BOSS. Reading, Mass.: Addison-Wesley Publishing Company, Inc., 1975.

Kristt, Carolyn. THE SUCCESSFUL CREATIVE SECRETARY. West Nyack, New York: Parker Publishing Company, Inc., 1979.

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SAN DIEGO CITY SCHOOLS OFFICE MANUAL. San Diego: San Diego City Schools, 1976.

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Taetzsch, Lyn; and Benson, Eileen. TAKING CHARGE ON THE JOB. New York: Executive Enterprises Publications, Inc., 1978.

District Publications

Accounts Payable Manual

Board Docket Manual

"Communicating With Your Trustees"--pamphlet

Educational Master Plan

Identity Specification Manual

Personnel Manual

Policies and Procedures Manual

District Policies and Procedures

Educational Master Plan, Policy 0001

Access to District Records, Policy 0002

Political Activity of Officers and Employees, Policy 0509

Use of District Equipment and Supplies, Policy 0530

Governance Publications, Policy 2002

Governance Publication Program, Procedure 2002.2
Legal Services, Procedure 2003.1
Warehousing and Disposition of Records, Procedure 2300.1

Illness, Injuries and Health Emergencies--Students, Policy C-2330

Personnel Administration, Procedure 4001.1

Equal Opportunity/Affirmative Action Employment, Policy 4100

Complaints, Procedure 4120.3

Professional Development, Policy 4400

Professional Development, Procedure 4400.2
District Professional Development Committee, Procedure 4400.3

Purchasing, Supply and Distribution System--General, Policy C-7008

Purchasing Information and Service, Whom To Call, Policy C-7008-1

Nonstock Supplies and Materials, Ordering, Policy C-7010

Stock Supplies and Materials--Ordering by Colleges and Departments, Policy C-7013

Stock Supplies--Telephone Ordering by Colleges and Departments, Policy C-7013-1

Affirmative Action Program (Vendors), Policy C-7100

Duplicating Services, Policy C-7220

Mail Service, Policy C-7233

Forms Design Service and Printing, Policy C-7240

Telephone Toll Calls, Policy C-7256

Service/Repair of Movable Equipment, Procedure 7300.1

Safety/Health, Policy 7400

- Bomb Threats, Procedure 7400.2
- District Safety Program, Procedure 7400.6

Nonstock Supplies, Return to Vendor for Credit, Policy C-7940

Stock, Return of for Credit (by Colleges and Other Offices), Policy C-7965

Travel, Policy 8960

- Employee Reimbursement for Use of Personal Car, Procedure 8960.1
- Travel With and Without Expenses, Procedure 8960.2

Literature and Publicity, Policy C-3925

ERIC Clearinghouse for Junior Colleges
8118 Math-Sciences Building
University of California
Los Angeles, California 90024

JUN 17 1983